PCOLS 101

INTERACTIVE TUTORIAL

Recommended Roles: A/OPC, A/BO Supervisor, A/BO, and RM

How to Create a New Managing Account in AIM

START

TUTORIAL ICON LEGEND:

⌂ ←

HOME/BACK: This icon will take you back to the List of Actions or back one action

→

NEXT: This icon will allow you to continue to the next action

↻

REPLAY: This icon will allow you to replay the action

✉

EMAIL: This icon will take you to the email message

↓

SCROLL: This icon will allow you to scroll down

ⓘ

INFO: This icon will take you to additional information

- **Agency/Organization Program Coordinator (A/OPC):** This icon will take you to the specific A/OPC action
- **Approving/Billing Officials Supervisor (A/BO Supervisor):** This icon will take you to the specific A/BO Supervisor action
- **Approving/Billing Official (A/BO):** This icon will take you to the specific A/BO action
- **Resource Manager (RM) and Resource Manager Pool:** This icon will take you to the specific RM action

The ⓘ button will appear on many screens throughout this tutorial. Click on this button to view additional information.

Click the ✖ button to return to the previous screen.

Clicking on an area highlighted by a red box will advance the tutorial to the next step.

➜

Index of Actions:

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A/BO Action 1
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AIM: Approve Managing Account

RM Action 1:
AIM: Accept Nomination as RM on Managing Account

RM Action 2:
AIM: Approve, Modify, or Reject the Financial Resources of the Following Managing Account

A/OPC Action 2:
AIM: Approve Managing Account

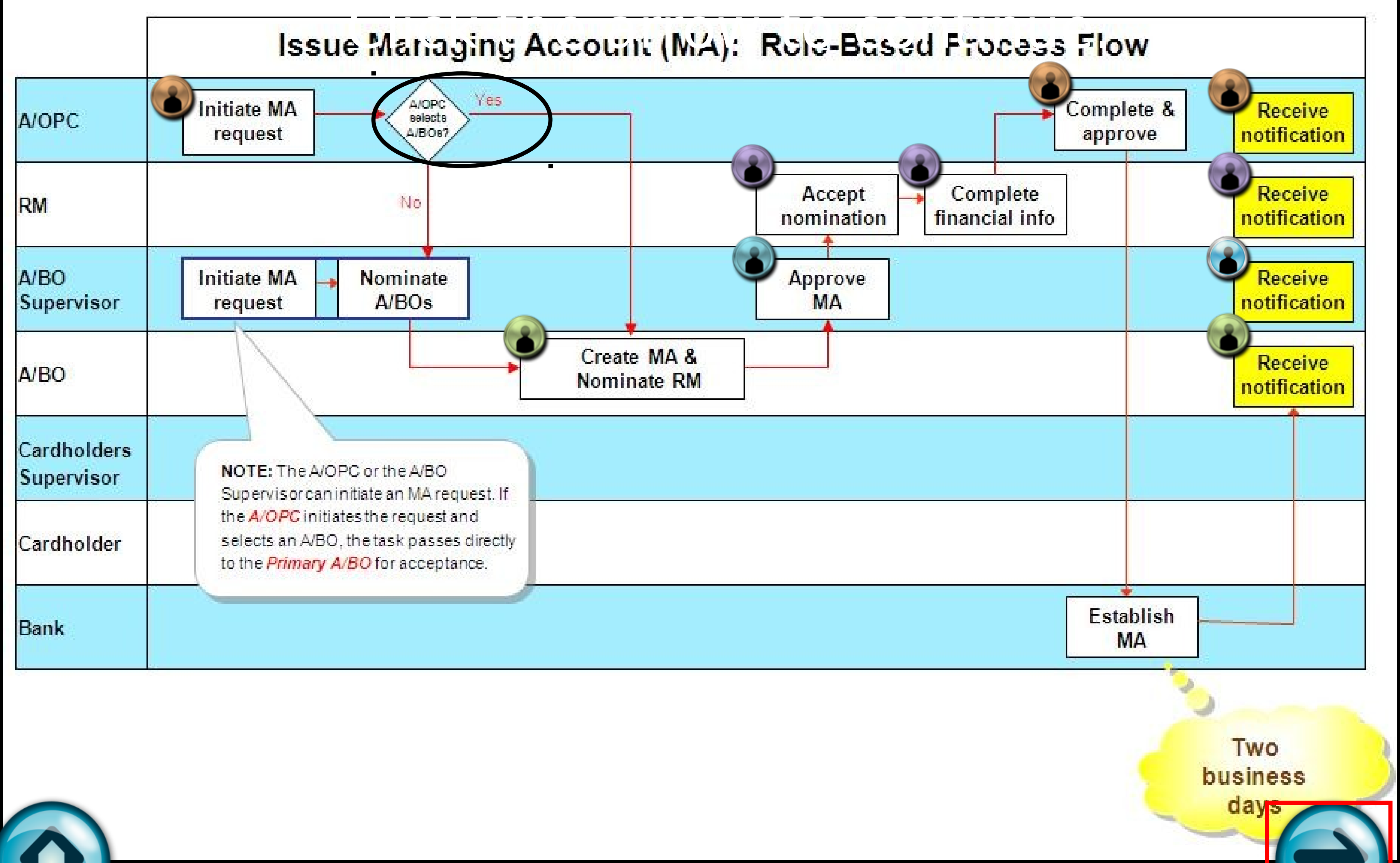
To go through all of the tasks in the recommended order, use the ➔ icon.

To go to a specific action use one of the ● ● ● ● icons next to the action to be redirected to that section of the tutorial. Click the “X” to return to the previous screen.

Scenario: The A/OPC would like to establish a new managing account for organization 110FW. All of the users that will be associated on this new account have been provisioned in EMMA under the 110FW organization and have redeemed their tokens.

The following interactive tutorial will allow you to see how all the users are involved to complete the set up of a new managing account in AIM.

The swim lane diagram shown below outlines the steps this tutorial will cover to complete the workflow for a new Managing Account in AIM.



Issue Managing Account (MA): Role-Based Process Flow

A/OPC
RM
A/BO Supervisor
A/BO
Cardholders Supervisor
Cardholder
Bank
Initiate MA request
A/OPC selects A/BOs?
Yes
No
Initiate MA request
Nominate A/BOs
Create MA & Nominate RM
Approve MA
Accept nomination
Complete financial info
Complete & approve
Establish MA
Receive notification
Receive notification
Receive notification
Receive notification
Two business days

NOTE: The A/OPC or the A/BO Supervisor can initiate an MA request. If the *A/OPC* initiates the request and selects an A/BO, the task passes directly to the *Primary A/BO* for acceptance.

A/OPC Action 1

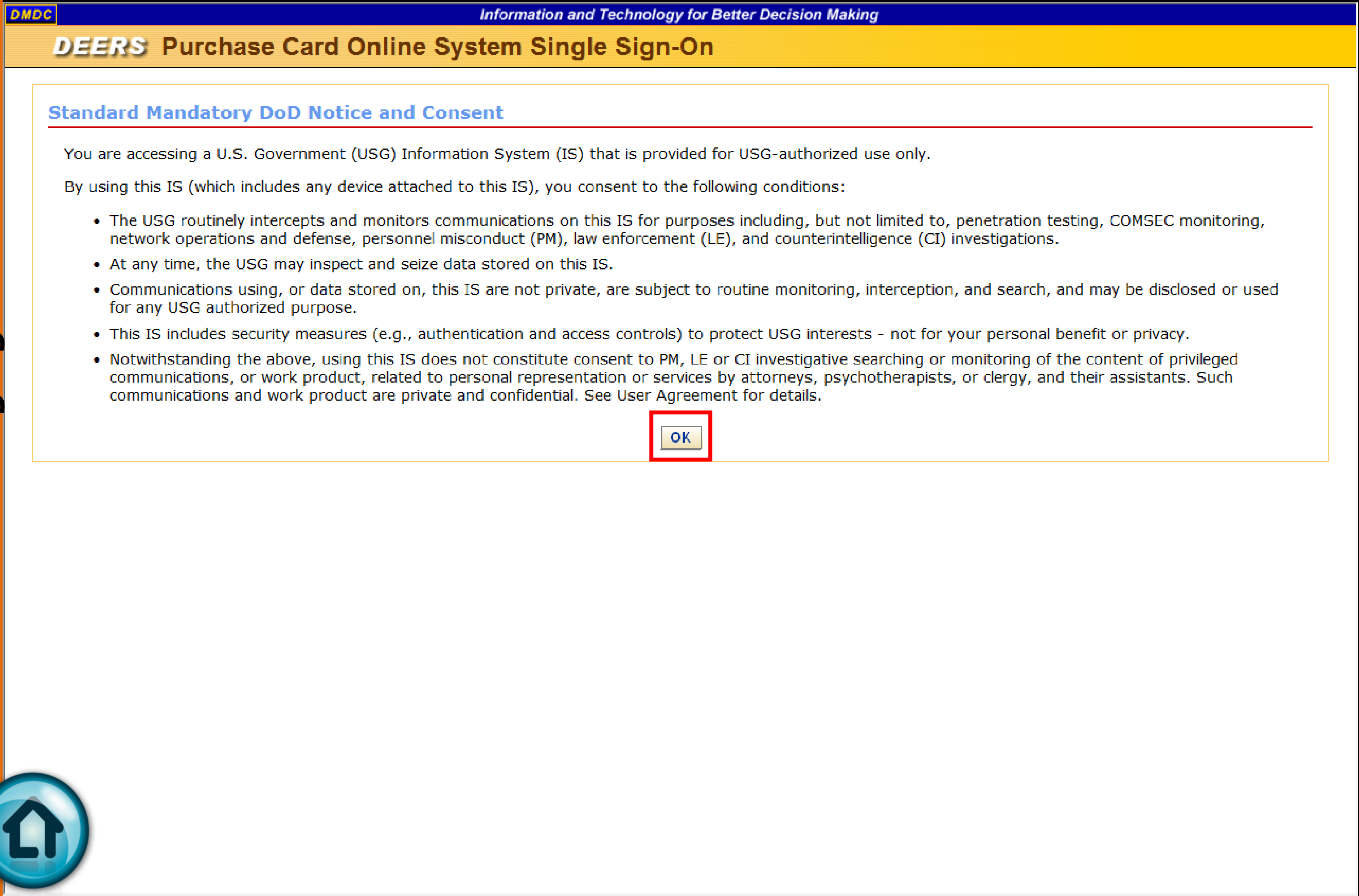
AIM: Initiate Request for New Managing Account

A/OPC Action 1 AIM: Initiate Request for New Managing Account

Go to PCOLS-Web:

https://pki.dmdc.osd.mil/appj/pcols-web/

Click the “OK” button.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Information and Technology for Better Decision Making
DEERS Purchase Card Online System Single Sign-On
OK

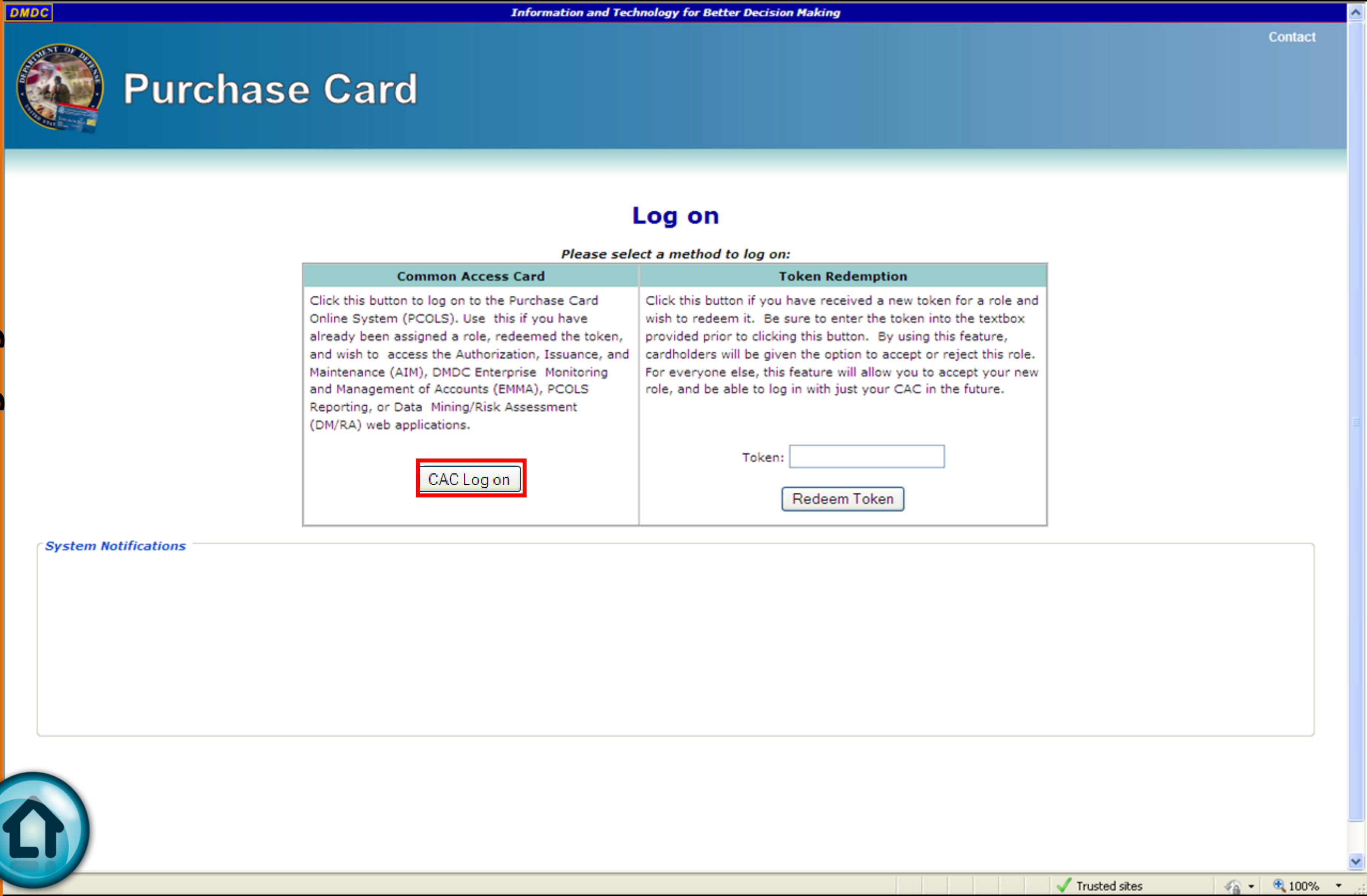
Standard Mandatory DoD Notice and Consent

You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only.

By using this IS (which includes any device attached to this IS), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests - not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential. See User Agreement for details.

Click the “CAC Log on” button.



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Contact
Purchase Card

Log on

Please select a method to log on:

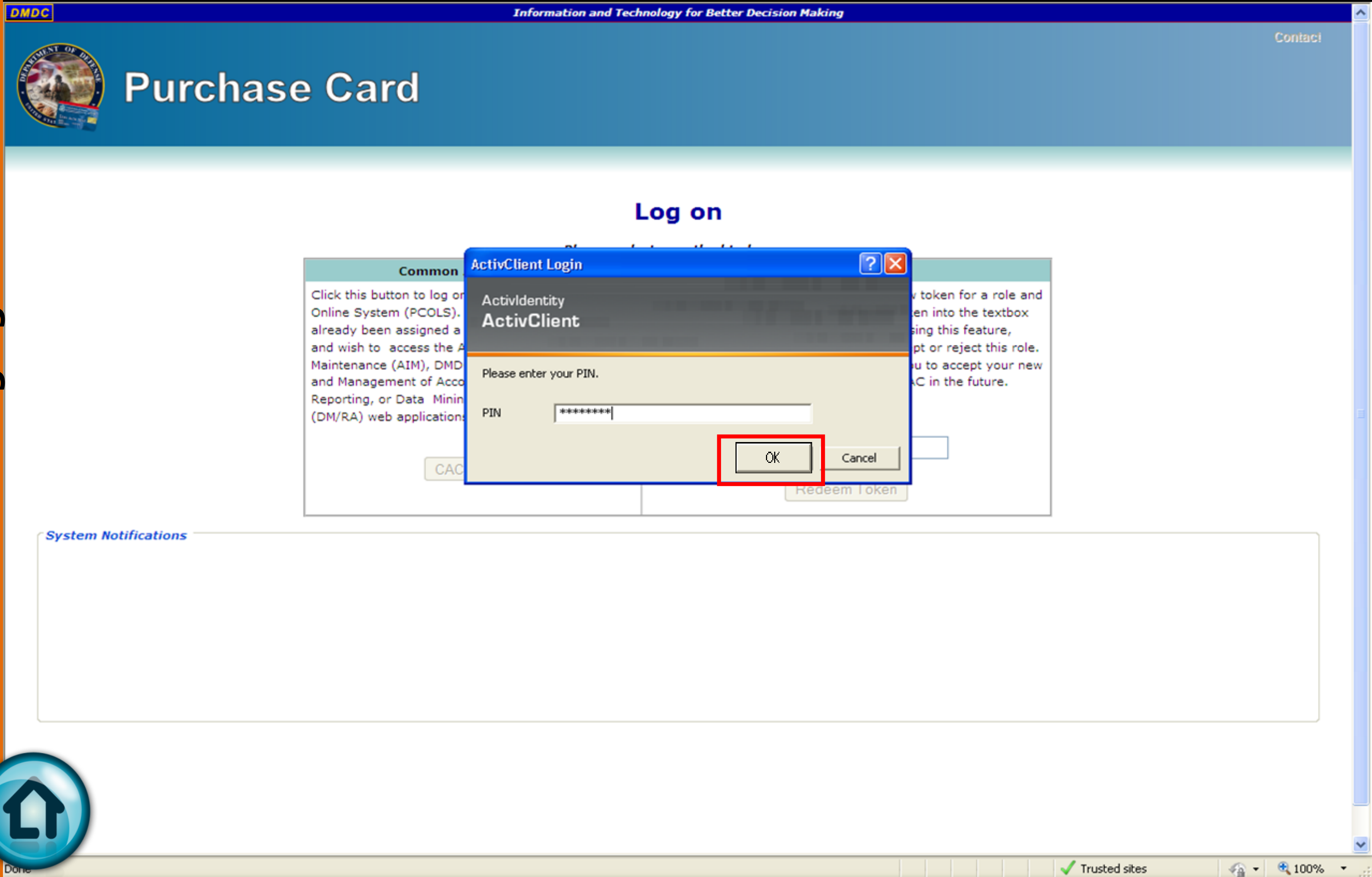
Common Access Card	Token Redemption
Click this button to log on to the Purchase Card Online System (PCOLS). Use this if you have already been assigned a role, redeemed the token, and wish to access the Authorization, Issuance, and Maintenance (AIM), DMDC Enterprise Monitoring and Management of Accounts (EMMA), PCOLS Reporting, or Data Mining/Risk Assessment (DM/RA) web applications.	Click this button if you have received a new token for a role and wish to redeem it. Be sure to enter the token into the textbox provided prior to clicking this button. By using this feature, cardholders will be given the option to accept or reject this role. For everyone else, this feature will allow you to accept your new role, and be able to log in with just your CAC in the future.
CAC Log on	Token: Redeem Token

System Notifications

Trusted sites
100%

The A/OPC enters their PIN. Click the “OK” button.

A/OPC Action 1 AIM: Initiate Request for New Managing Account



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Log on

Common

Click this button to log o
Online System (PCOLS).
already been assigned a
and wish to access the A
Maintenance (AIM), DMD
and Management of Acco
Reporting, or Data Minin
(DM/RA) web application

token for a role and
en into the textbox
ing this feature,
pt or reject this role.
u to accept your new
C in the future.

ActivClient Login

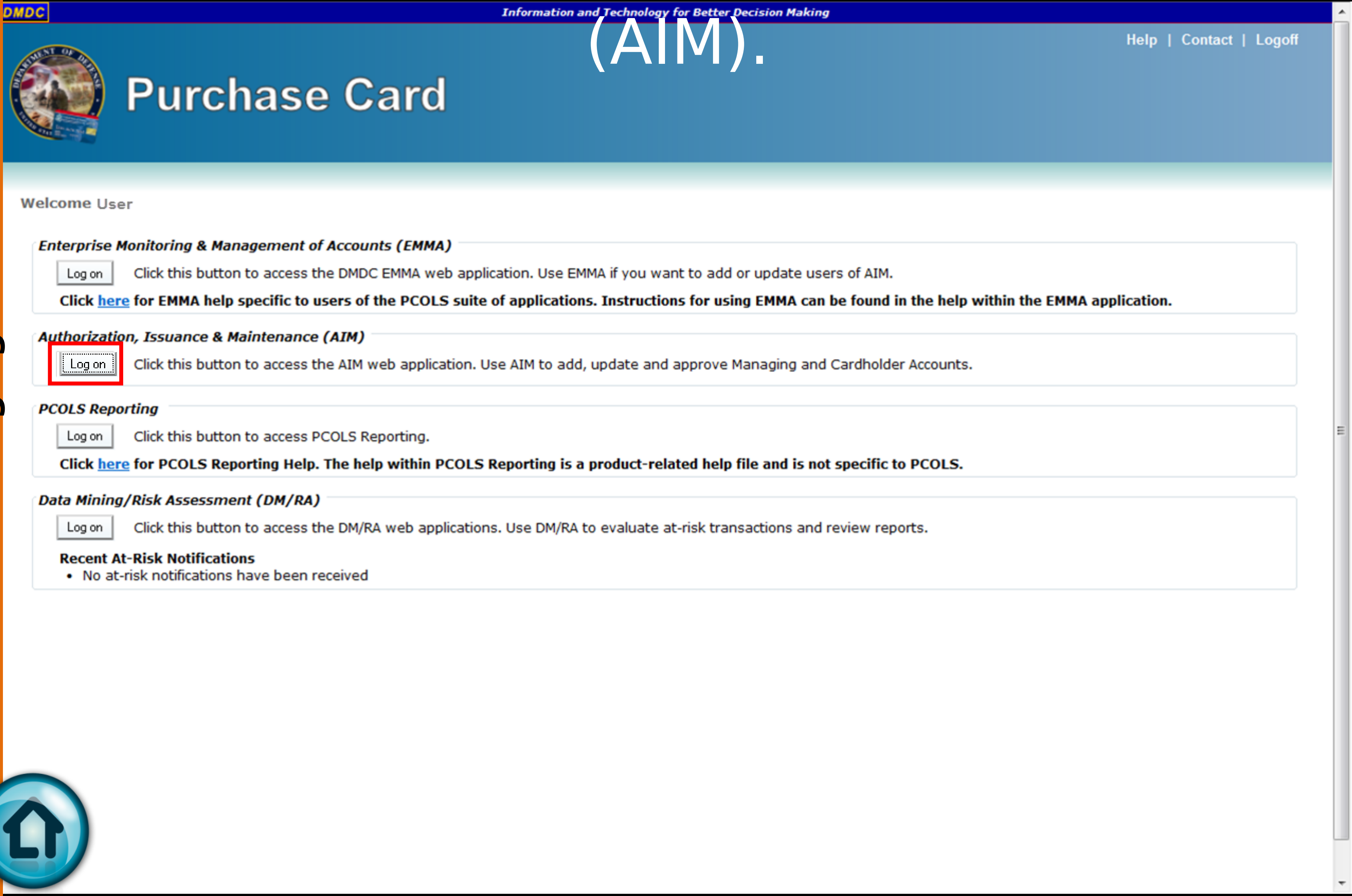
ActivIdentity
ActivClient

Please enter your PIN.

PIN: *********

CAC
OK
Cancel
Redeem Token
System Notifications
Done
Trusted sites
100%

Click on the “Log on” button for Authorization, Issuance & Maintenance (AIM).



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Purchase Card

Welcome User

Enterprise Monitoring & Management of Accounts (EMMA)

Log on Click this button to access the DMDC EMMA web application. Use EMMA if you want to add or update users of AIM.

Click here for EMMA help specific to users of the PCOLS suite of applications. Instructions for using EMMA can be found in the help within the EMMA application.

Authorization, Issuance & Maintenance (AIM)

Log on Click this button to access the AIM web application. Use AIM to add, update and approve Managing and Cardholder Accounts.

PCOLS Reporting

Log on Click this button to access PCOLS Reporting.

Click here for PCOLS Reporting Help. The help within PCOLS Reporting is a product-related help file and is not specific to PCOLS.

Data Mining/Risk Assessment (DM/RA)

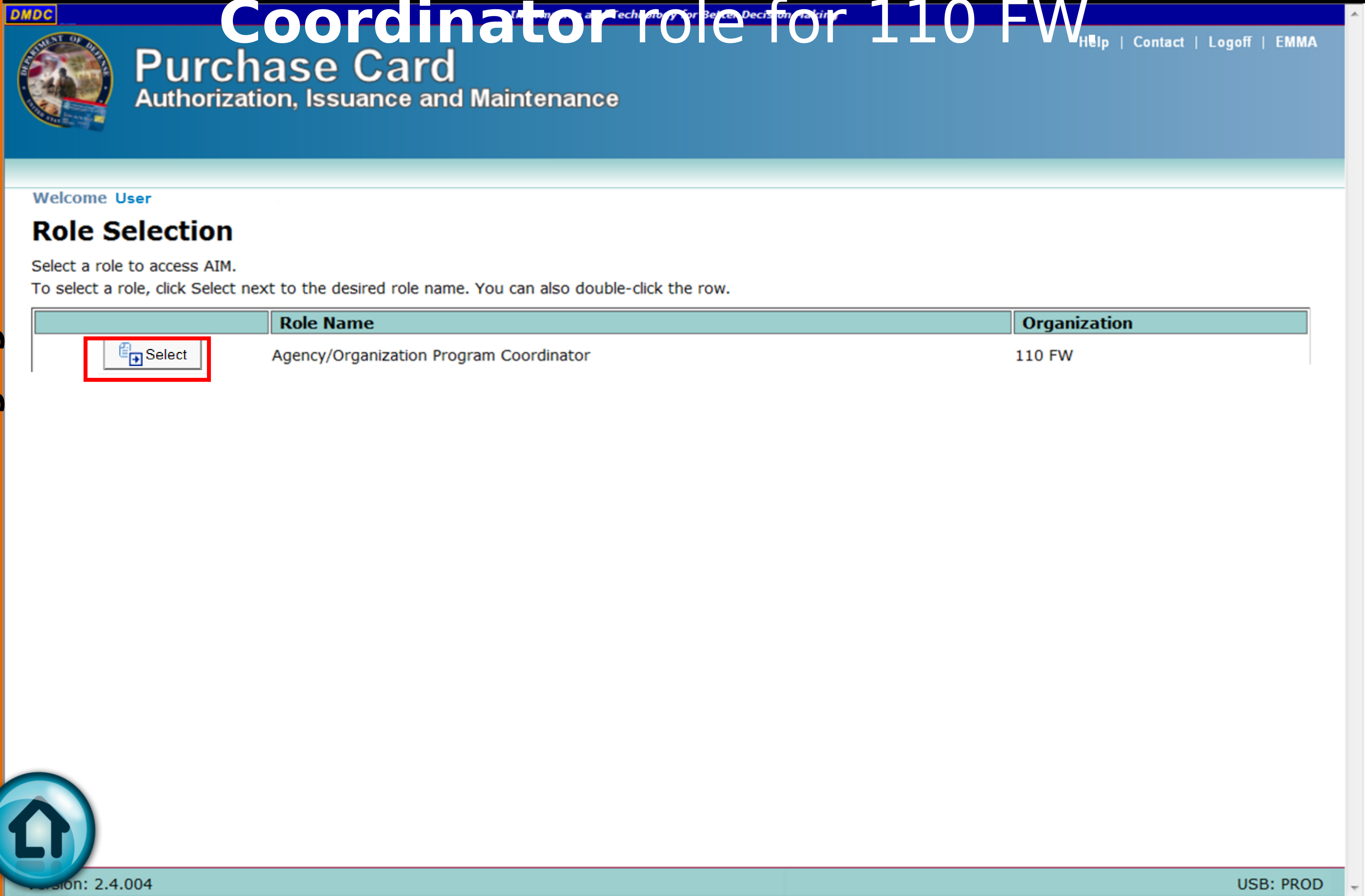
Log on Click this button to access the DM/RA web applications. Use DM/RA to evaluate at-risk transactions and review reports.

Recent At-Risk Notifications

- No at-risk notifications have been received

A/OPC Action 1 AIM: Initiate Request for New Managing Account

Click the “Select” button for the **Agency/Organization Program Coordinator** role for 110 FW.


DMDC
Help | Contact | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance

Welcome User

Role Selection

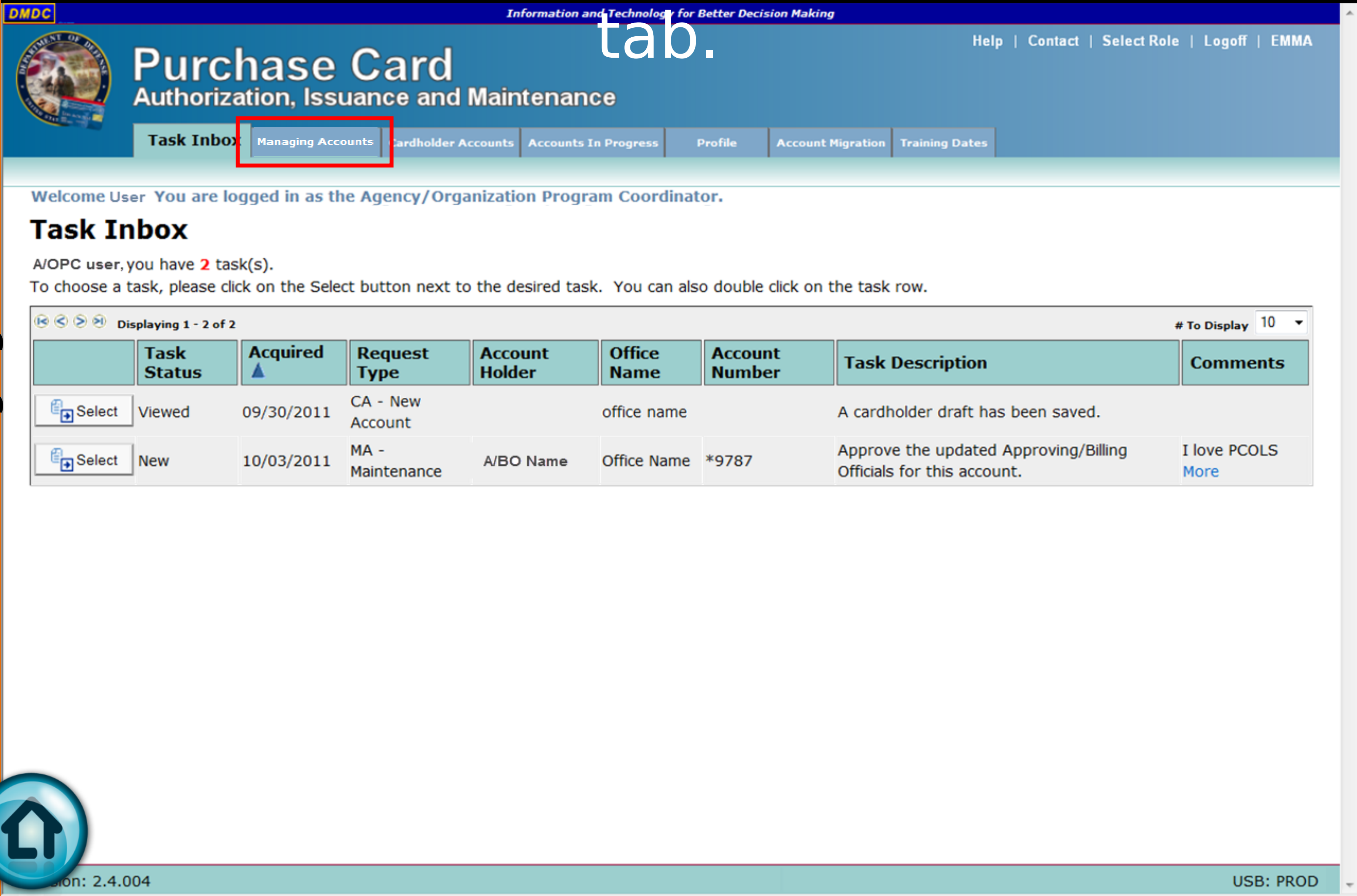
Select a role to access AIM.
To select a role, click Select next to the desired role name. You can also double-click the row.

	Role Name	Organization
Select	Agency/Organization Program Coordinator	110 FW

rsion: 2.4.004
USB: PROD

To initiate a request for a new Managing Account click on the "Managing Accounts" tab.

A/OPC Action 1 AIM: Initiate Request for New Managing Account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Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
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Account Migration
Training Dates

Welcome User You are logged in as the Agency/Organization Program Coordinator.

Task Inbox

A/OPC user, you have 2 task(s).

To choose a task, please click on the Select button next to the desired task. You can also double click on the task row.

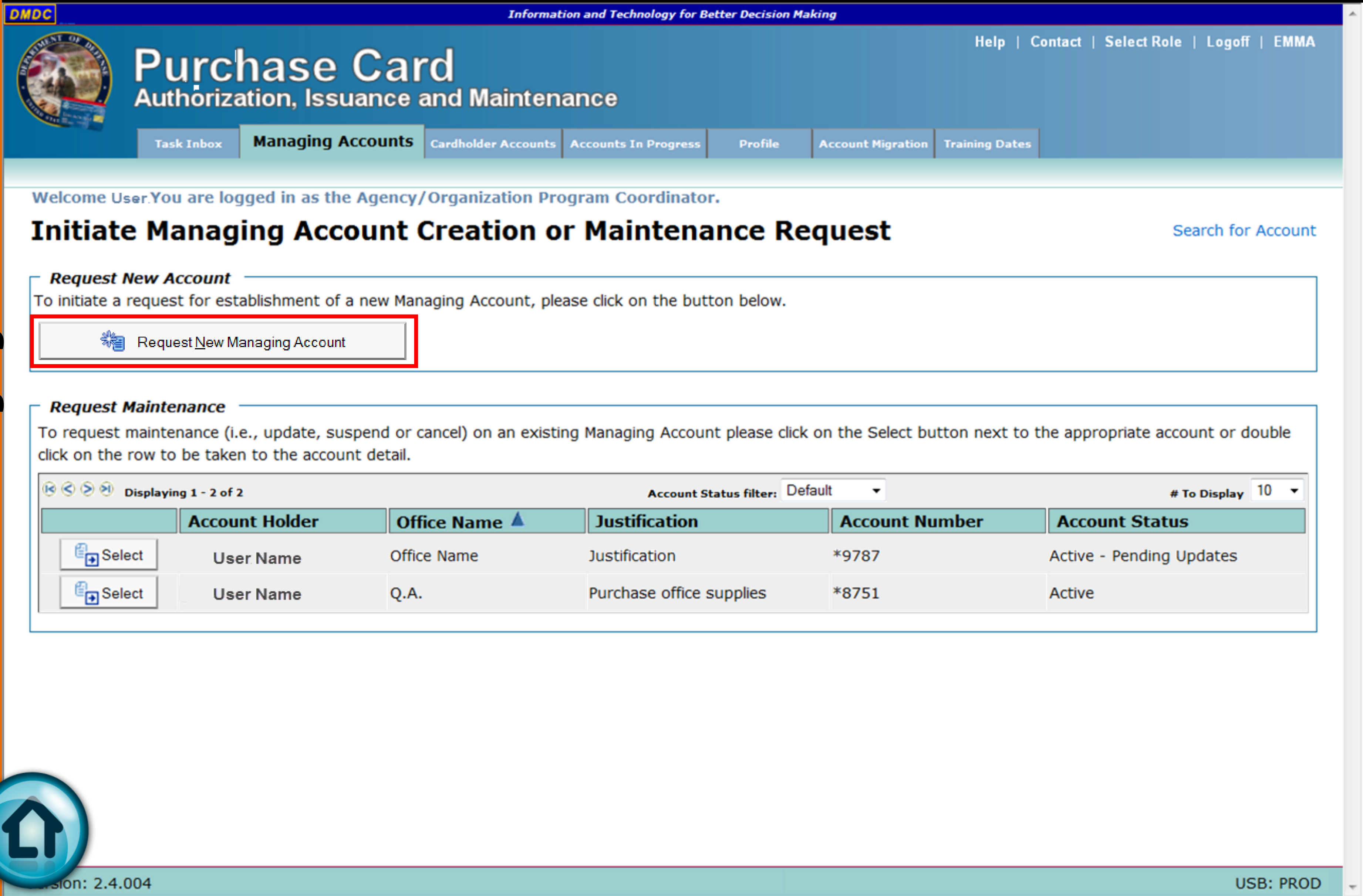
Displaying 1 - 2 of 2 # To Display 10

	Task Status	Acquired	Request Type	Account Holder	Office Name	Account Number	Task Description	Comments
Select	Viewed	09/30/2011	CA - New Account		office name		A cardholder draft has been saved.	
Select	New	10/03/2011	MA - Maintenance	A/BO Name	Office Name	*9787	Approve the updated Approving/Billing Officials for this account.	I love PCOLS More

sion: 2.4.004 USB: PROD

A/OPC Action 1 AIM: Initiate Request for New
Managing Account

Click on the “Request New Managing Account” button.



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Welcome User You are logged in as the Agency/Organization Program Coordinator.

Initiate Managing Account Creation or Maintenance Request

Search for Account

Request New Account

To initiate a request for establishment of a new Managing Account, please click on the button below.

Request New Managing Account

Request Maintenance

To request maintenance (i.e., update, suspend or cancel) on an existing Managing Account please click on the Select button next to the appropriate account or double click on the row to be taken to the account detail.

Displaying 1 - 2 of 2

Account Status filter: Default

# To Display 10

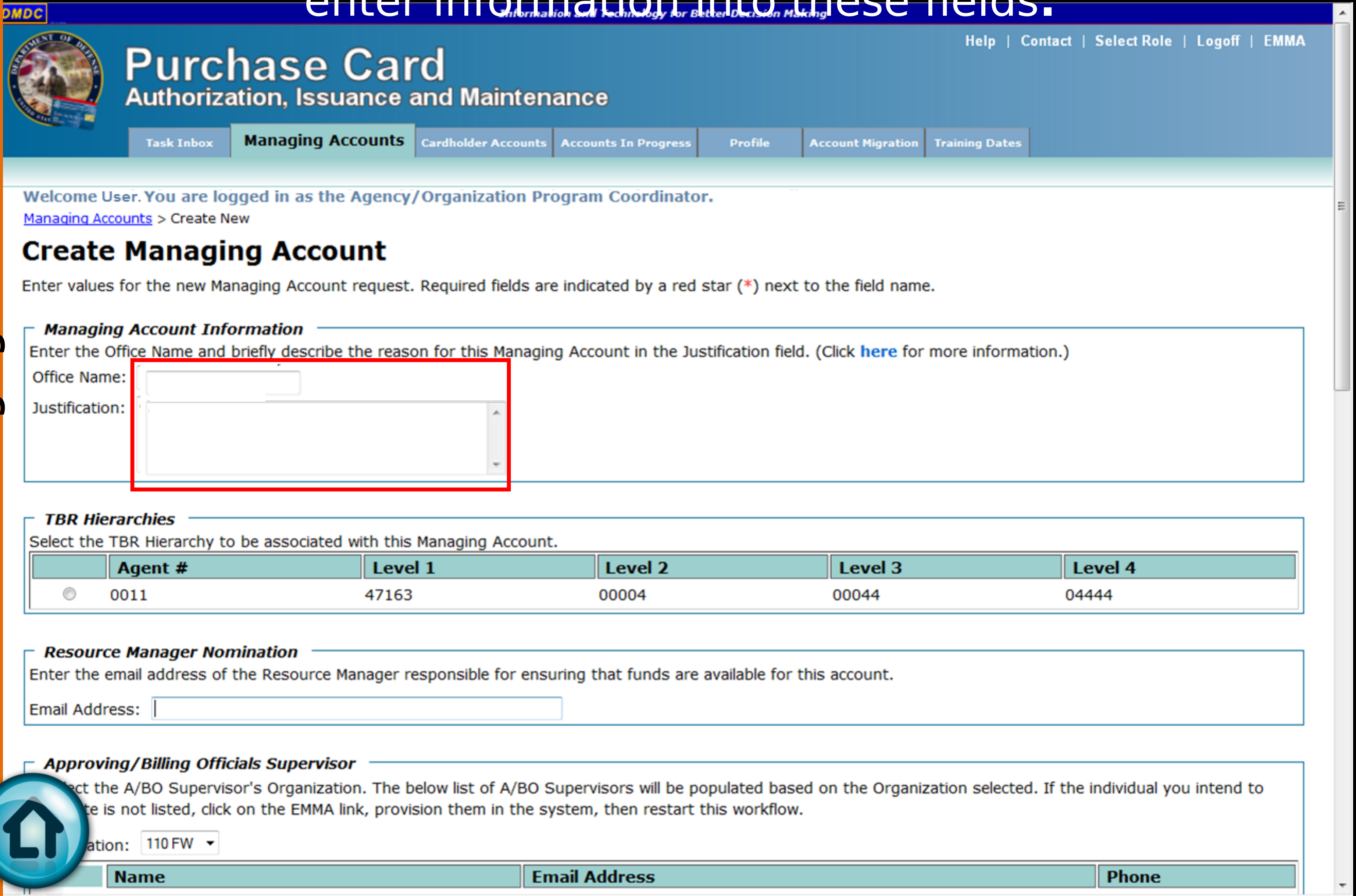
	Account Holder	Office Name	Justification	Account Number	Account Status
Select	User Name	Office Name	Justification	*9787	Active - Pending Updates
Select	User Name	Q.A.	Purchase office supplies	*8751	Active

sion: 2.4.004

USB: PROD

A/OPC Action 1 AIM: Initiate Request for New Managing Account

The A/OPC has the option to enter the **Office Name** and **Justification**. Note that only fields with "*" are required. Click on the area under Managing Account Information to enter information into these fields.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Authorization, Issuance and Maintenance

Welcome User. You are logged in as the Agency/Organization Program Coordinator.

Managing Accounts > Create New

Create Managing Account

Enter values for the new Managing Account request. Required fields are indicated by a red star (*) next to the field name.

Managing Account Information

Enter the Office Name and briefly describe the reason for this Managing Account in the Justification field. (Click here for more information.)

Office Name:

Justification:

TBR Hierarchies

Select the TBR Hierarchy to be associated with this Managing Account.

	Agent #	Level 1	Level 2	Level 3	Level 4
○	0011	47163	00004	00044	04444

Resource Manager Nomination

Enter the email address of the Resource Manager responsible for ensuring that funds are available for this account.

Email Address:

Approving/Billing Officials Supervisor

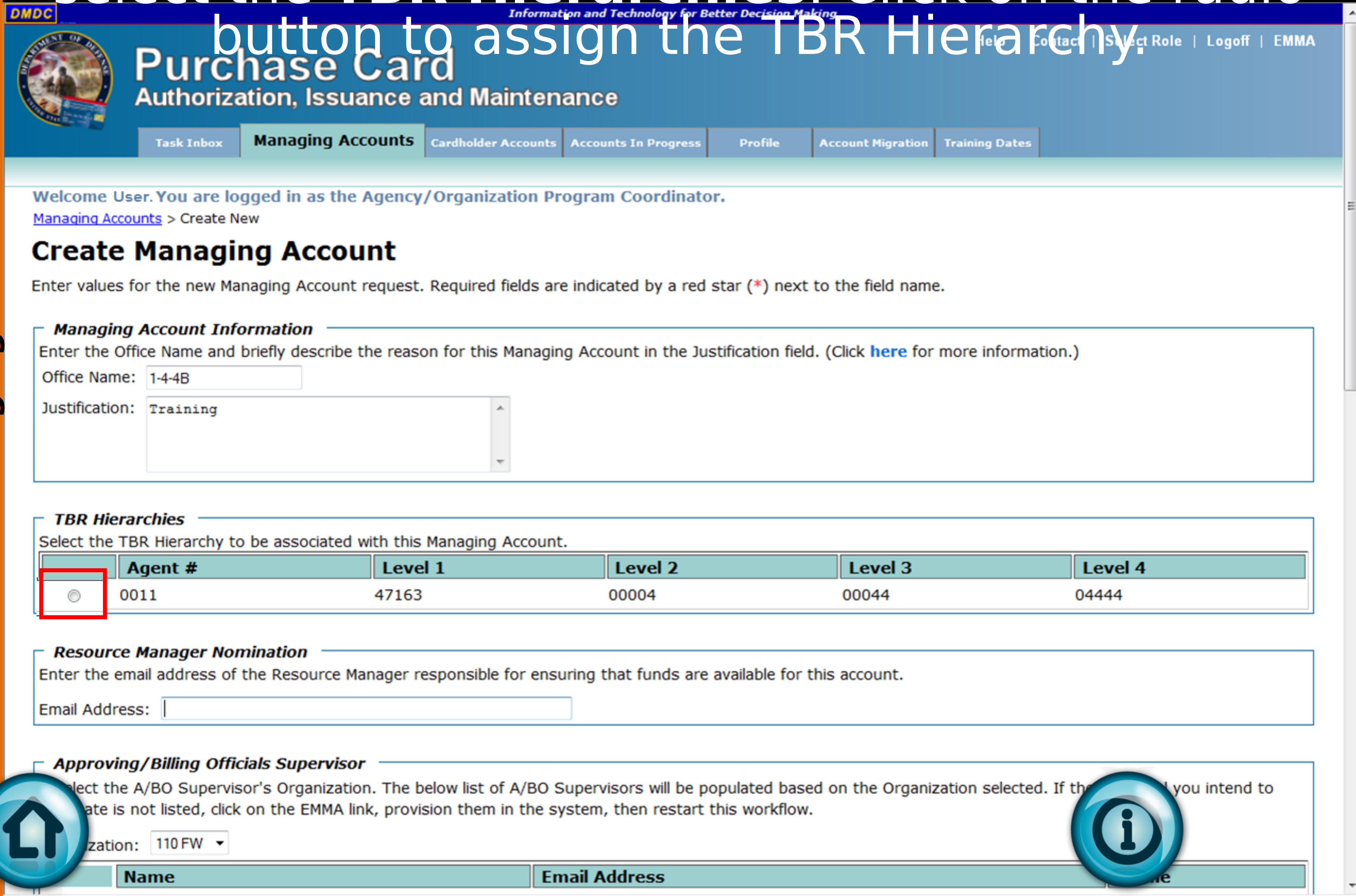
ct the A/BO Supervisor's Organization. The below list of A/BO Supervisors will be populated based on the Organization selected. If the individual you intend to te is not listed, click on the EMMA link, provision them in the system, then restart this workflow.

ation: 110 FW

	Name	Email Address	Phone

A/OPC Action 1 AIM: Initiate Request for New Managing Account

The A/OPC has entered the **Office Name** and **Justification.** The A/OPC has the option to select the **TBR Hierarchies**. Click on the radio button to assign the TBR Hierarchy.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Welcome User. You are logged in as the Agency/Organization Program Coordinator.

Managing Accounts > Create New

Create Managing Account

Enter values for the new Managing Account request. Required fields are indicated by a red star (*) next to the field name.

Managing Account Information

Enter the Office Name and briefly describe the reason for this Managing Account in the Justification field. (Click here for more information.)

Office Name: 1-4-4B

Justification: Training

TBR Hierarchies

Select the TBR Hierarchy to be associated with this Managing Account.

	Agent #	Level 1	Level 2	Level 3	Level 4
○	0011	47163	00004	00044	04444

Resource Manager Nomination

Enter the email address of the Resource Manager responsible for ensuring that funds are available for this account.

Email Address:

Approving/Billing Officials Supervisor

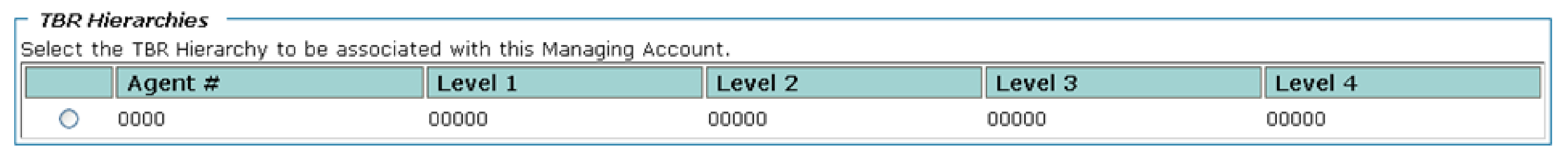
lect the A/BO Supervisor's Organization. The below list of A/BO Supervisors will be populated based on the Organization selected. If th you intend to ate is not listed, click on the EMMA link, provision them in the system, then restart this workflow.

zation: 110 FW

	Name	Email Address	e

TBR Hierarchies – The A/OPC has the option to select the TBR Hierarchy that should be assigned to this Managing Account.

Note: During the Managing Account Creation step, this is optional; however, the field will be required in the Managing Account Approval step



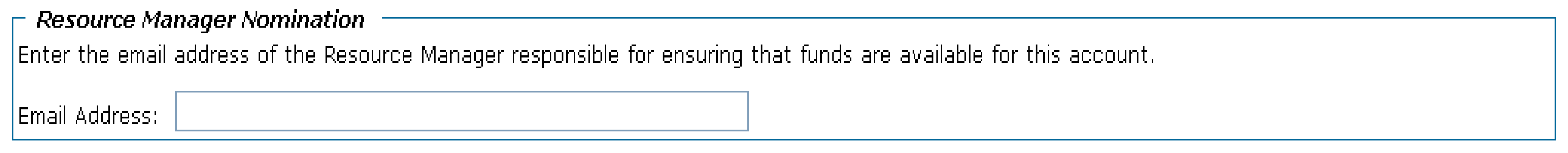
TBR Hierarchies

Select the TBR Hierarchy to be associated with this Managing Account.

	Agent #	Level 1	Level 2	Level 3	Level 4
○	0000	00000	00000	00000	00000

Resource Manager Nomination – The A/OPC has the option to enter the email address of the RM assigned to this account.

Note: The RM that you assign to the Managing Account will also be assigned to all Cardholder Accounts created beneath it.



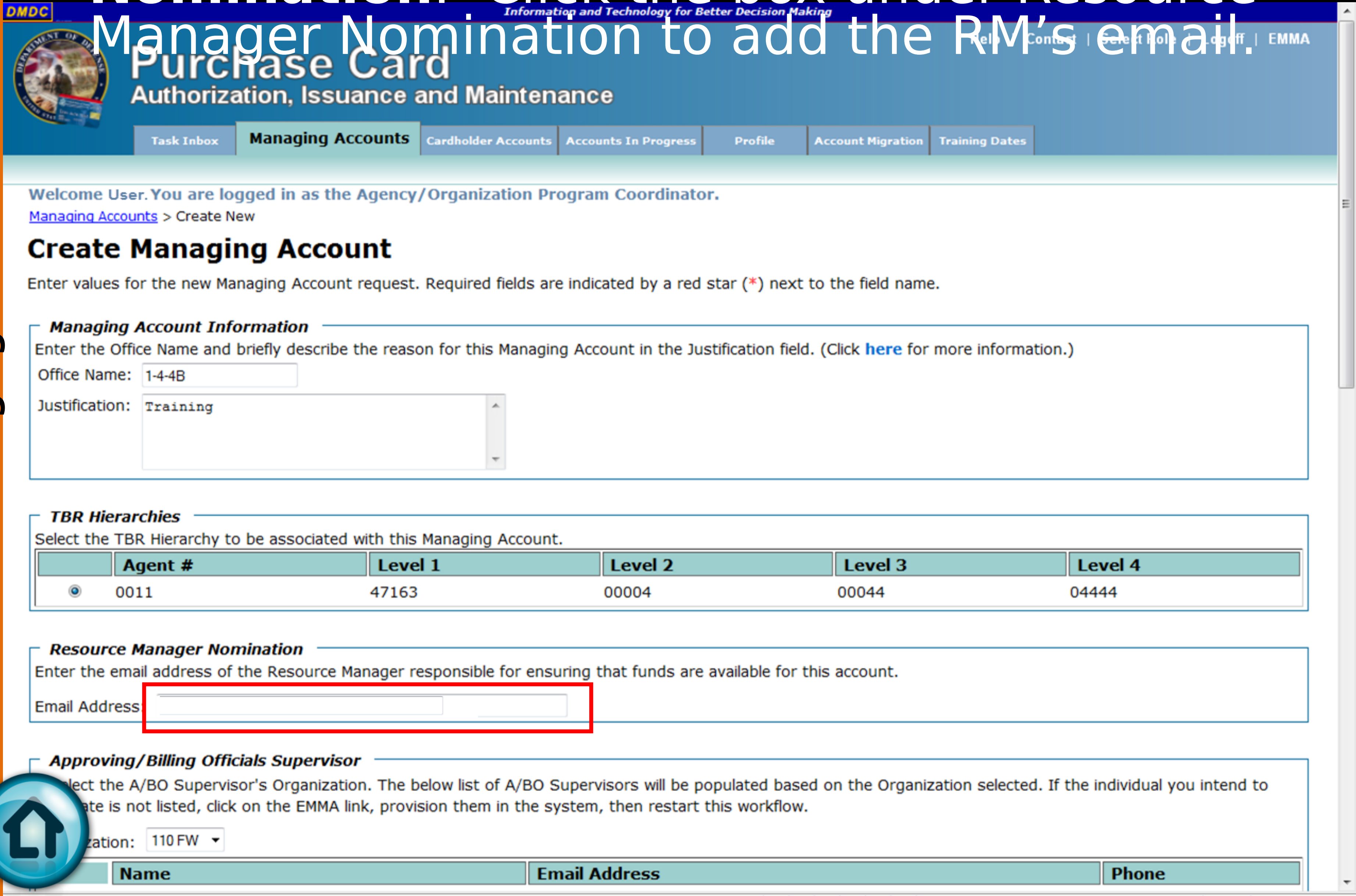
Resource Manager Nomination

Enter the email address of the Resource Manager responsible for ensuring that funds are available for this account.

Email Address:

A/OPC Action 1 AIM: Initiate Request for New Managing Account

The A/OPC has the option to enter the RM's email address for the **Resource Manager Nomination**. Click the box under Resource Manager Nomination to add the RM's email.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Welcome User. You are logged in as the Agency/Organization Program Coordinator.

Managing Accounts > Create New

Create Managing Account

Enter values for the new Managing Account request. Required fields are indicated by a red star (*) next to the field name.

Managing Account Information

Enter the Office Name and briefly describe the reason for this Managing Account in the Justification field. (Click **here** for more information.)

Office Name: 1-4-4B

Justification: Training

TBR Hierarchies

Select the TBR Hierarchy to be associated with this Managing Account.

	Agent #	Level 1	Level 2	Level 3	Level 4
●	0011	47163	00004	00044	04444

Resource Manager Nomination

Enter the email address of the Resource Manager responsible for ensuring that funds are available for this account.

Email Address:

Approving/Billing Officials Supervisor

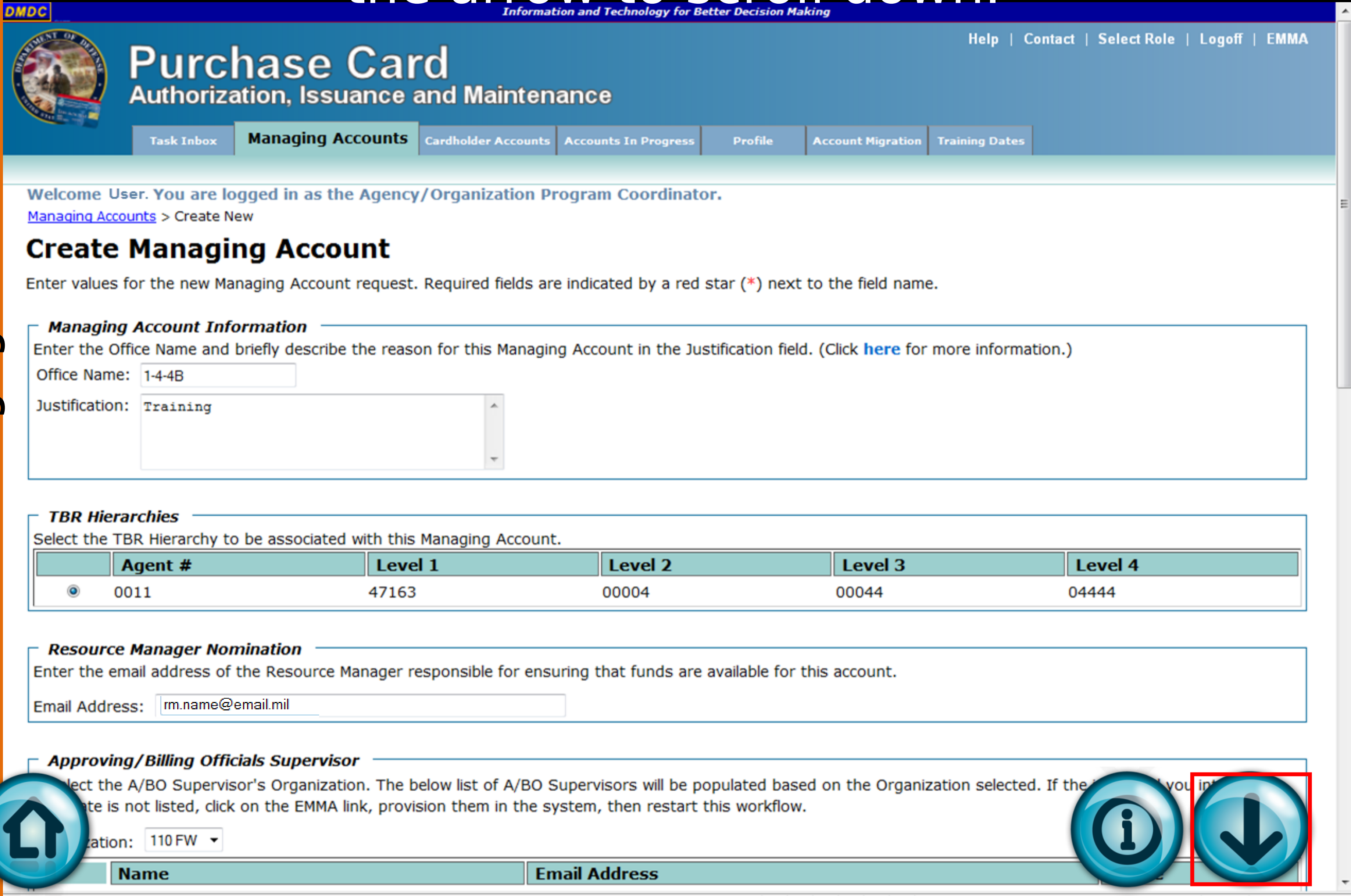
lect the A/BO Supervisor's Organization. The below list of A/BO Supervisors will be populated based on the Organization selected. If the individual you intend to ate is not listed, click on the EMMA link, provision them in the system, then restart this workflow.

zation: 110 FW

	Name	Email Address	Phone

A/OPC Action 1 AIM: Initiate Request for New Managing Account

The A/OPC has entered the RM's email address for the **Resource Manager Nomination**. Click the arrow to scroll down.



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Authorization, Issuance and Maintenance

Welcome User. You are logged in as the Agency/Organization Program Coordinator.

Managing Accounts > Create New

Create Managing Account

Enter values for the new Managing Account request. Required fields are indicated by a red star (*) next to the field name.

Managing Account Information

Enter the Office Name and briefly describe the reason for this Managing Account in the Justification field. (Click here for more information.)

Office Name: 1-4-4B

Justification: Training

TBR Hierarchies

Select the TBR Hierarchy to be associated with this Managing Account.

	Agent #	Level 1	Level 2	Level 3	Level 4
●	0011	47163	00004	00044	04444

Resource Manager Nomination

Enter the email address of the Resource Manager responsible for ensuring that funds are available for this account.

Email Address: rm.name@email.mil

Approving/Billing Officials Supervisor

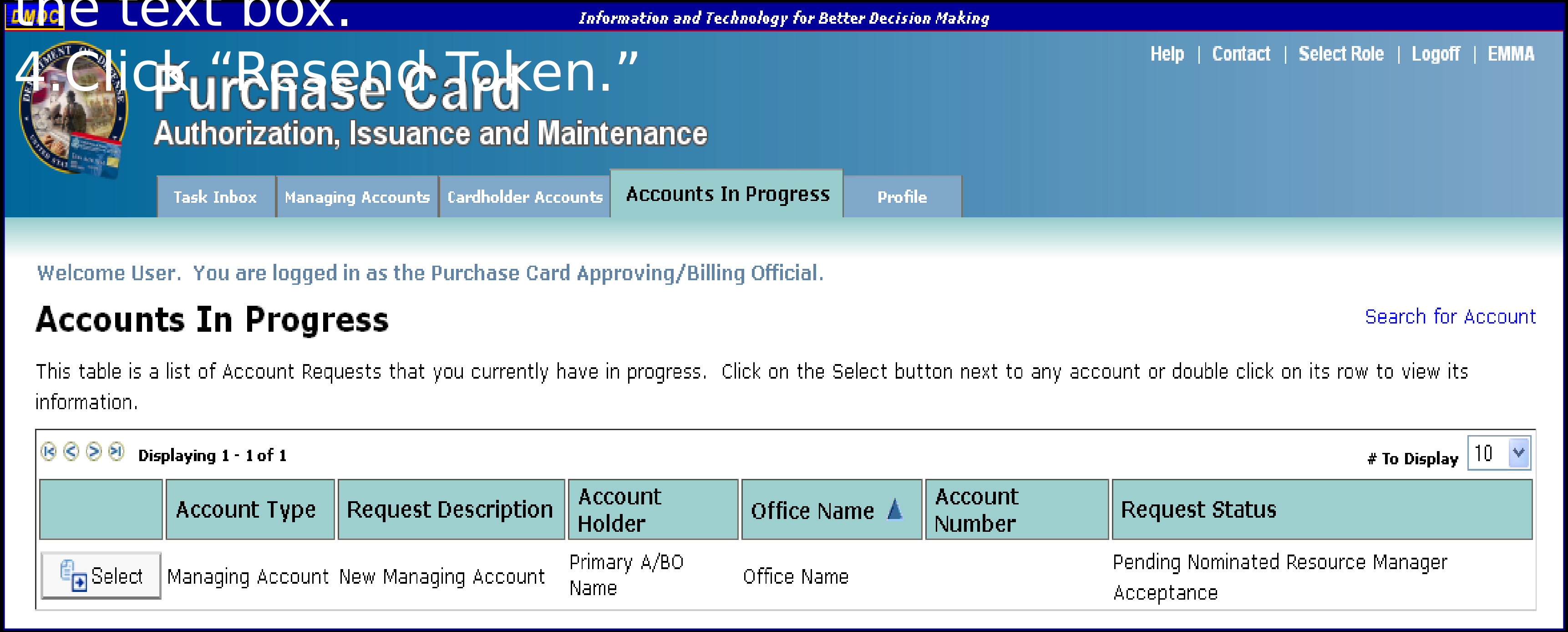
lect the A/BO Supervisor's Organization. The below list of A/BO Supervisors will be populated based on the Organization selected. If the you in te is not listed, click on the EMMA link, provision them in the system, then restart this workflow.

ation: 110 FW

	Name	Email Address

The A/OPCs and A/BOs have the authority to resend a token to the nominated RM during the Managing Account Issuance process. To resend a token:

1. Click the Accounts in Progress tab.
2. Click Select next to the workflow that needs the RM token resent.
3. In the Resend Resource Manager Token box, verify that the RM's email address is correct. If it is not, correct the address in the text box.
4. Click "Resend Token."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Accounts In Progress
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Welcome User. You are logged in as the Purchase Card Approving/Billing Official.

Accounts In Progress

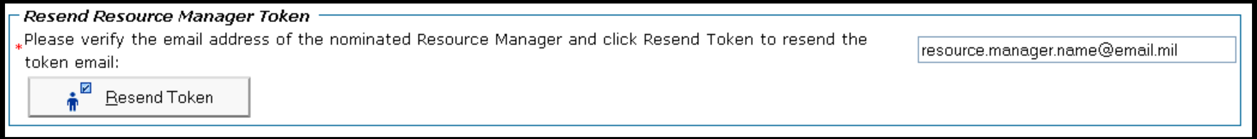
Search for Account

This table is a list of Account Requests that you currently have in progress. Click on the Select button next to any account or double click on its row to view its information.

Displaying 1 - 1 of 1

To Display 10

	Account Type	Request Description	Account Holder	Office Name ▲	Account Number	Request Status
Select	Managing Account	New Managing Account	Primary A/BO Name	Office Name		Pending Nominated Resource Manager Acceptance



Resend Resource Manager Token

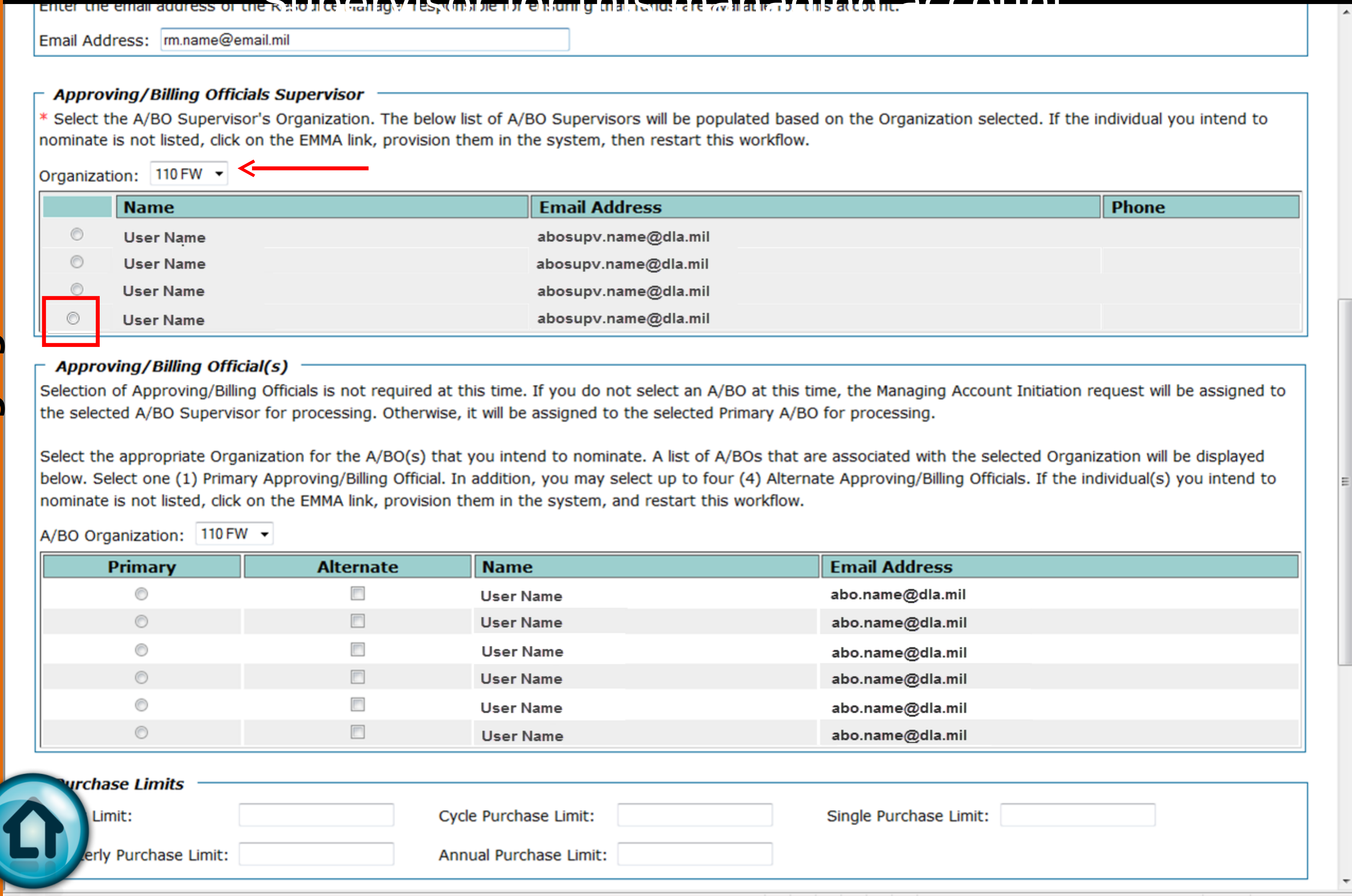
* Please verify the email address of the nominated Resource Manager and click Resend Token to resend the token email:

resource.manager.name@email.mil

Resend Token

A/OPC Action 1 AIM: Initiate Request for New Managing Account

The A/OPC selects the correct A/BO Supervisor organization, 110 FW, from the selections available in the drop down menu. Click on the radio button to assign the A/BO Supervisor for this managing account.



Enter the email address of the Resource Manager responsible for ensuring that funds are available for this account.

Email Address: rm.name@email.mil

Approving/Billing Officials Supervisor

* Select the A/BO Supervisor's Organization. The below list of A/BO Supervisors will be populated based on the Organization selected. If the individual you intend to nominate is not listed, click on the EMMA link, provision them in the system, then restart this workflow.

Organization: 110 FW

	Name	Email Address	Phone
○	User Name	abosupv.name@dla.mil	
○	User Name	abosupv.name@dla.mil	
○	User Name	abosupv.name@dla.mil	
○	User Name	abosupv.name@dla.mil	

Approving/Billing Official(s)

Selection of Approving/Billing Officials is not required at this time. If you do not select an A/BO at this time, the Managing Account Initiation request will be assigned to the selected A/BO Supervisor for processing. Otherwise, it will be assigned to the selected Primary A/BO for processing.

Select the appropriate Organization for the A/BO(s) that you intend to nominate. A list of A/BOs that are associated with the selected Organization will be displayed below. Select one (1) Primary Approving/Billing Official. In addition, you may select up to four (4) Alternate Approving/Billing Officials. If the individual(s) you intend to nominate is not listed, click on the EMMA link, provision them in the system, and restart this workflow.

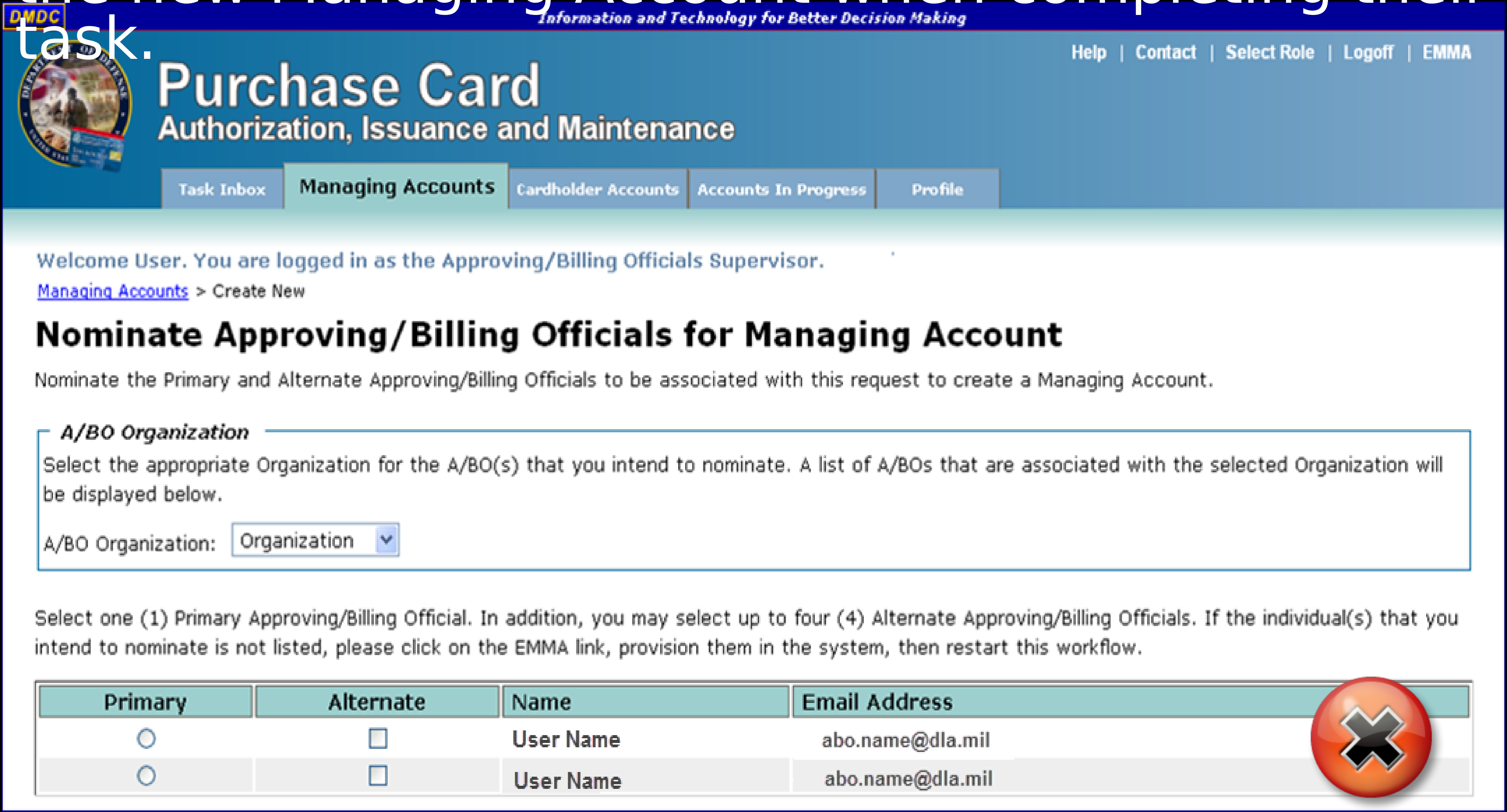
A/BO Organization: 110 FW

Primary	Alternate	Name	Email Address
○	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil

urchase Limits

Limit:
Cycle Purchase Limit:
Single Purchase Limit:
erly Purchase Limit:
Annual Purchase Limit:

Note: If the A/OPC initiates the request for a Managing Account and does NOT select the A/BOs that should be assigned to the account, the A/BO Supervisor will be required to select the A/BOs for the new Managing Account when completing their task.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Welcome User. You are logged in as the Approving/Billing Officials Supervisor.

Managing Accounts > Create New

Nominate Approving/Billing Officials for Managing Account

Nominate the Primary and Alternate Approving/Billing Officials to be associated with this request to create a Managing Account.

A/BO Organization

Select the appropriate Organization for the A/BO(s) that you intend to nominate. A list of A/BOs that are associated with the selected Organization will be displayed below.

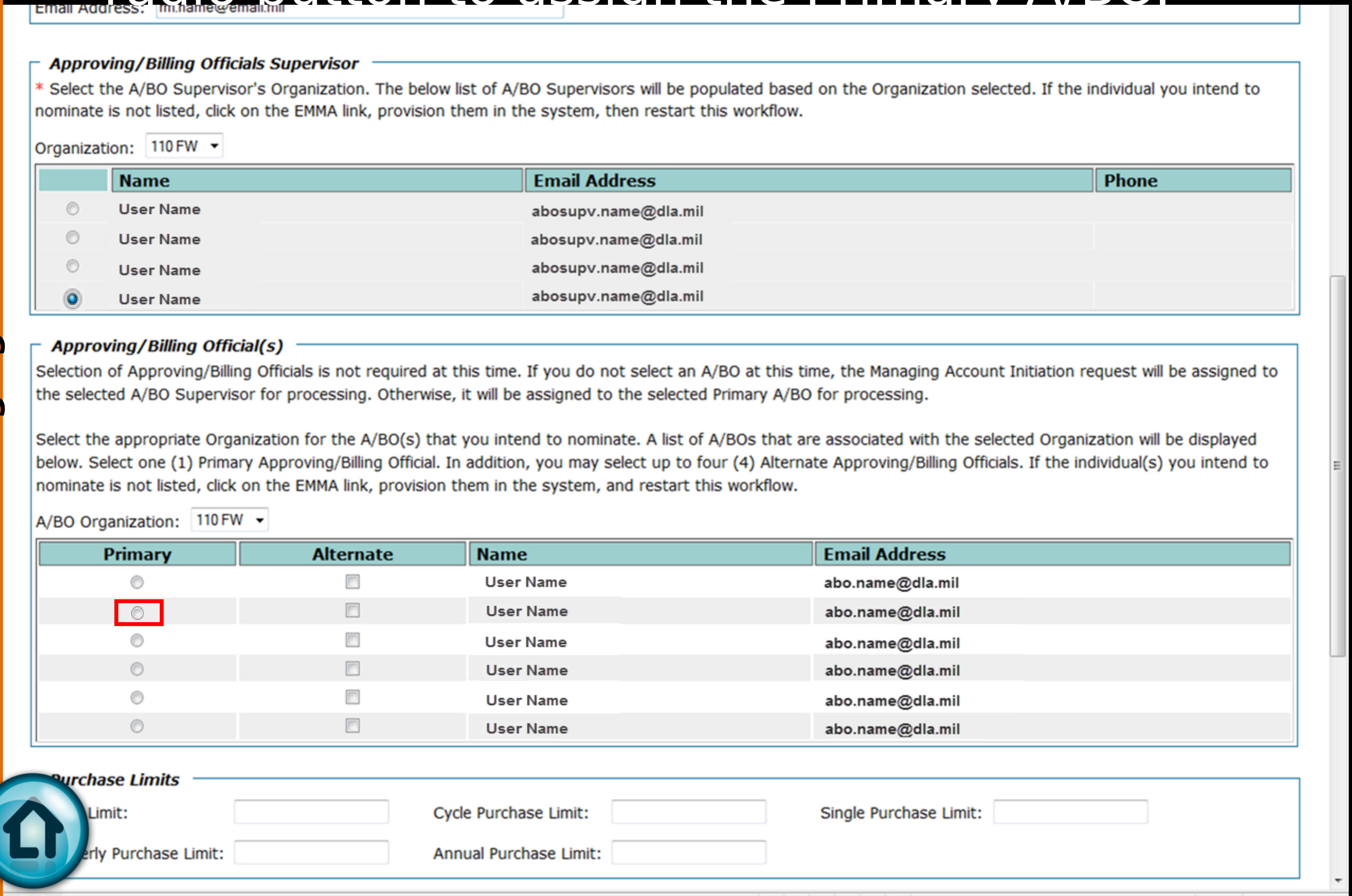
A/BO Organization: Organization

Select one (1) Primary Approving/Billing Official. In addition, you may select up to four (4) Alternate Approving/Billing Officials. If the individual(s) that you intend to nominate is not listed, please click on the EMMA link, provision them in the system, then restart this workflow.

Primary	Alternate	Name	Email Address
○	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil

A/OPC Action 1 AIM: Initiate Request for New Managing Account

The A/OPC has the option to nominate the A/BOs for the new Managing Account. Click on the radio button to assign the Primary A/BO.



Email Address: fm.name@email.mil

Approving/Billing Officials Supervisor

* Select the A/BO Supervisor's Organization. The below list of A/BO Supervisors will be populated based on the Organization selected. If the individual you intend to nominate is not listed, click on the EMMA link, provision them in the system, then restart this workflow.

Organization: 110 FW

	Name	Email Address	Phone
○	User Name	abosupv.name@dla.mil	
○	User Name	abosupv.name@dla.mil	
○	User Name	abosupv.name@dla.mil	
●	User Name	abosupv.name@dla.mil	

Approving/Billing Official(s)

Selection of Approving/Billing Officials is not required at this time. If you do not select an A/BO at this time, the Managing Account Initiation request will be assigned to the selected A/BO Supervisor for processing. Otherwise, it will be assigned to the selected Primary A/BO for processing.

Select the appropriate Organization for the A/BO(s) that you intend to nominate. A list of A/BOs that are associated with the selected Organization will be displayed below. Select one (1) Primary Approving/Billing Official. In addition, you may select up to four (4) Alternate Approving/Billing Officials. If the individual(s) you intend to nominate is not listed, click on the EMMA link, provision them in the system, and restart this workflow.

A/BO Organization: 110 FW

Primary	Alternate	Name	Email Address
○	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil

Purchase Limits

Limit:

Cycle Purchase Limit:

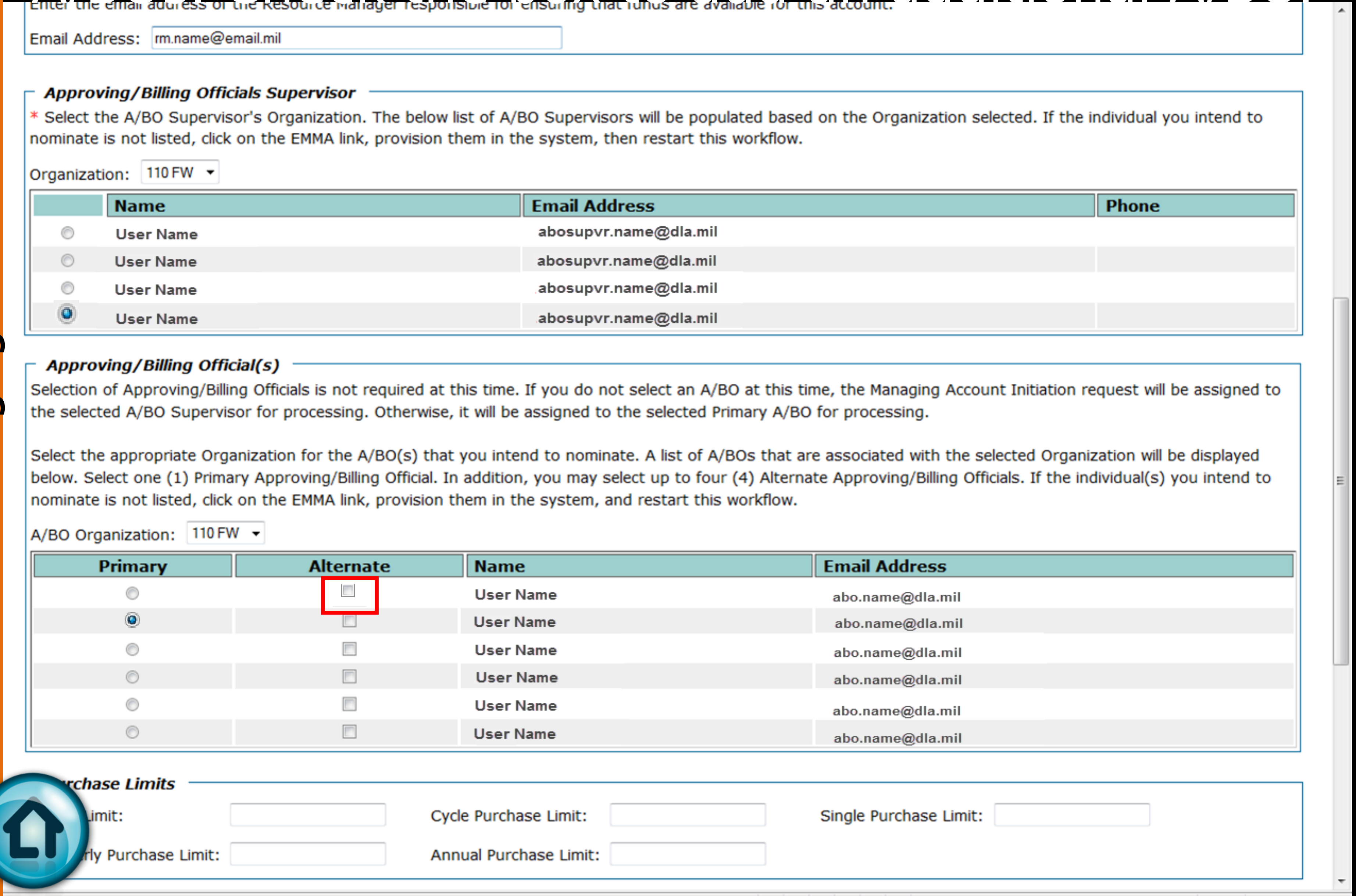
Single Purchase Limit:

rly Purchase Limit:

Annual Purchase Limit:

A/OPC Action 1 AIM: Initiate Request for New Managing Account

The A/OPC has the option to assign up to 4 alternate A/BOs. This account has 3 alternate A/BOs. Check the box to add an additional A/BO.



Enter the email address of the Resource Manager responsible for ensuring that funds are available for this account.

Email Address: rm.name@email.mil

Approving/Billing Officials Supervisor

* Select the A/BO Supervisor's Organization. The below list of A/BO Supervisors will be populated based on the Organization selected. If the individual you intend to nominate is not listed, click on the EMMA link, provision them in the system, then restart this workflow.

Organization: 110 FW

	Name	Email Address	Phone
○	User Name	abosupvr.name@dla.mil	
○	User Name	abosupvr.name@dla.mil	
○	User Name	abosupvr.name@dla.mil	
●	User Name	abosupvr.name@dla.mil	

Approving/Billing Official(s)

Selection of Approving/Billing Officials is not required at this time. If you do not select an A/BO at this time, the Managing Account Initiation request will be assigned to the selected A/BO Supervisor for processing. Otherwise, it will be assigned to the selected Primary A/BO for processing.

Select the appropriate Organization for the A/BO(s) that you intend to nominate. A list of A/BOs that are associated with the selected Organization will be displayed below. Select one (1) Primary Approving/Billing Official. In addition, you may select up to four (4) Alternate Approving/Billing Officials. If the individual(s) you intend to nominate is not listed, click on the EMMA link, provision them in the system, and restart this workflow.

A/BO Organization: 110 FW

Primary	Alternate	Name	Email Address
○	☐	User Name	abo.name@dla.mil
●	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil

rchase Limits

imit:

Cycle Purchase Limit:

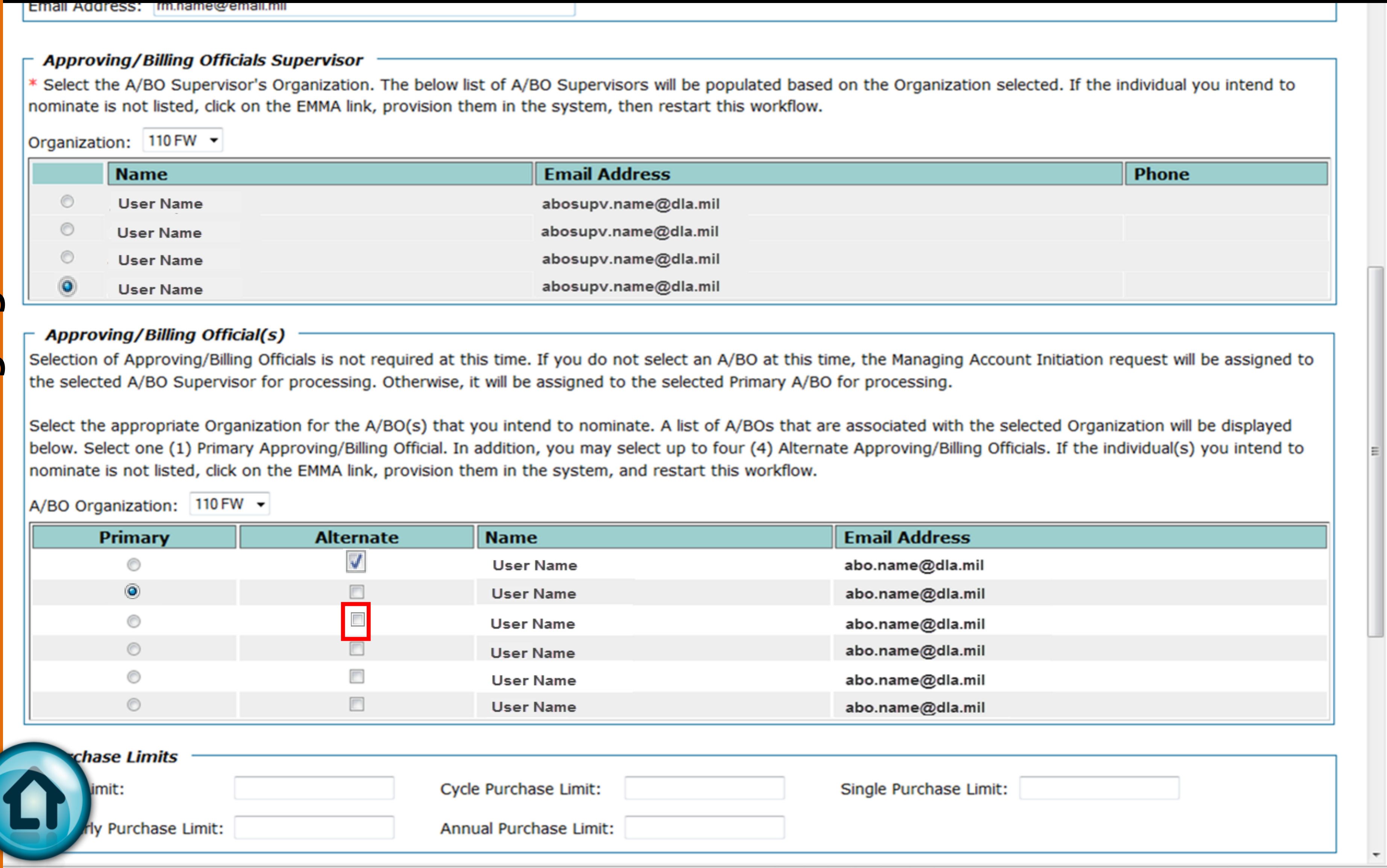
Single Purchase Limit:

rly Purchase Limit:

Annual Purchase Limit:

Check the box to add an additional A/BO.

A/OPC Action 1 AIM: Initiate Request for New Managing Account



Email Address: fm.name@email.mil

Approving/Billing Officials Supervisor

* Select the A/BO Supervisor's Organization. The below list of A/BO Supervisors will be populated based on the Organization selected. If the individual you intend to nominate is not listed, click on the EMMA link, provision them in the system, then restart this workflow.

Organization: 110 FW

	Name	Email Address	Phone
○	User Name	abosupv.name@dla.mil	
○	User Name	abosupv.name@dla.mil	
○	User Name	abosupv.name@dla.mil	
●	User Name	abosupv.name@dla.mil	

Approving/Billing Official(s)

Selection of Approving/Billing Officials is not required at this time. If you do not select an A/BO at this time, the Managing Account Initiation request will be assigned to the selected A/BO Supervisor for processing. Otherwise, it will be assigned to the selected Primary A/BO for processing.

Select the appropriate Organization for the A/BO(s) that you intend to nominate. A list of A/BOs that are associated with the selected Organization will be displayed below. Select one (1) Primary Approving/Billing Official. In addition, you may select up to four (4) Alternate Approving/Billing Officials. If the individual(s) you intend to nominate is not listed, click on the EMMA link, provision them in the system, and restart this workflow.

A/BO Organization: 110 FW

Primary	Alternate	Name	Email Address
○	☑	User Name	abo.name@dla.mil
●	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil

chase Limits

imit:

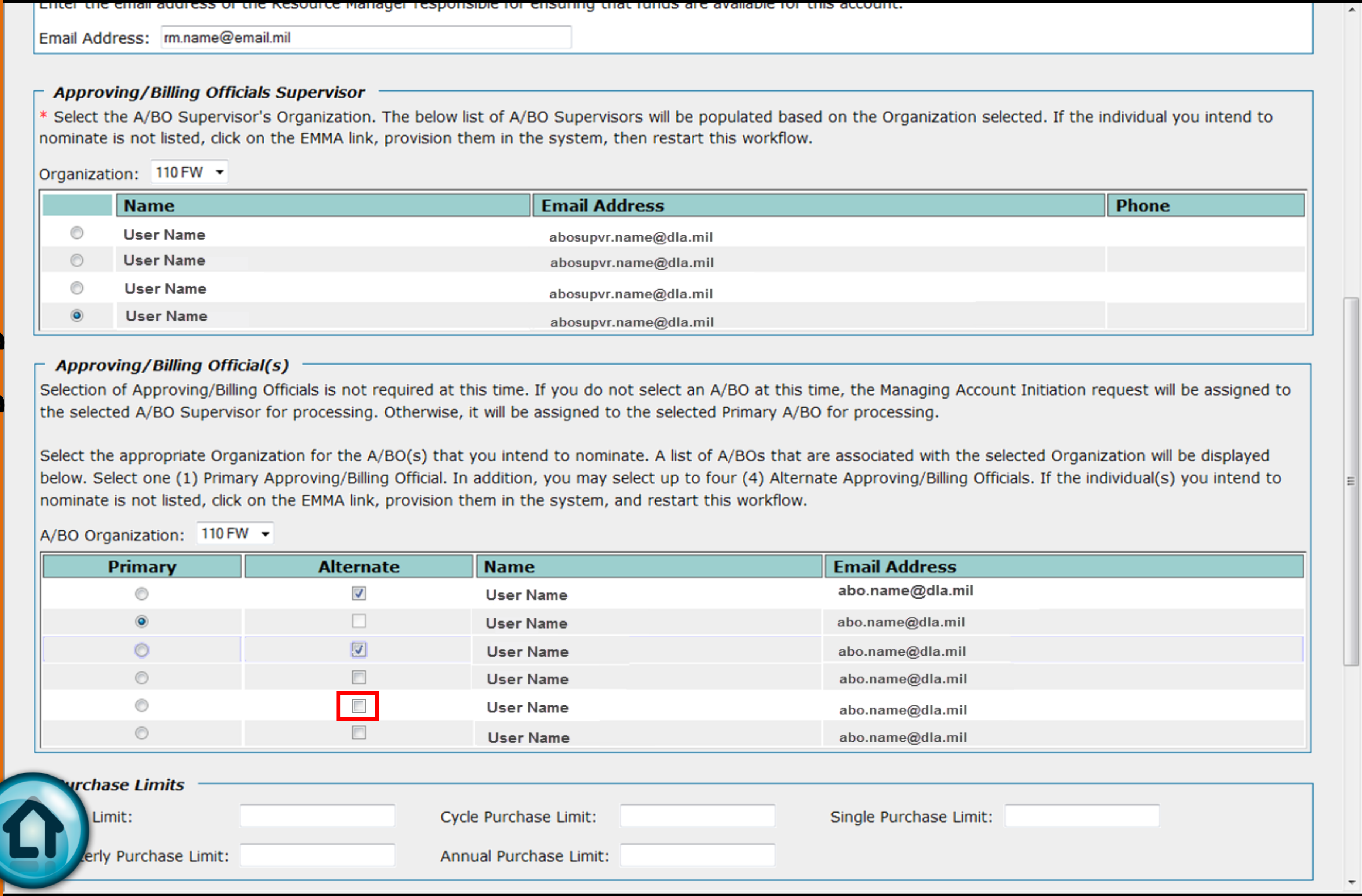
Cycle Purchase Limit:

Single Purchase Limit:

rly Purchase Limit:

Annual Purchase Limit:

Check the box to add an additional A/BO.



Enter the email address of the Resource Manager responsible for ensuring that funds are available for this account.

Email Address: rm.name@email.mil

Approving/Billing Officials Supervisor

* Select the A/BO Supervisor's Organization. The below list of A/BO Supervisors will be populated based on the Organization selected. If the individual you intend to nominate is not listed, click on the EMMA link, provision them in the system, then restart this workflow.

Organization: 110 FW

	Name	Email Address	Phone
○	User Name	abosupvr.name@dla.mil	
○	User Name	abosupvr.name@dla.mil	
○	User Name	abosupvr.name@dla.mil	
●	User Name	abosupvr.name@dla.mil	

Approving/Billing Official(s)

Selection of Approving/Billing Officials is not required at this time. If you do not select an A/BO at this time, the Managing Account Initiation request will be assigned to the selected A/BO Supervisor for processing. Otherwise, it will be assigned to the selected Primary A/BO for processing.

Select the appropriate Organization for the A/BO(s) that you intend to nominate. A list of A/BOs that are associated with the selected Organization will be displayed below. Select one (1) Primary Approving/Billing Official. In addition, you may select up to four (4) Alternate Approving/Billing Officials. If the individual(s) you intend to nominate is not listed, click on the EMMA link, provision them in the system, and restart this workflow.

A/BO Organization: 110 FW

Primary	Alternate	Name	Email Address
○	☑	User Name	abo.name@dla.mil
●	☐	User Name	abo.name@dla.mil
○	☑	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil

urchase Limits

Limit:

Cycle Purchase Limit:

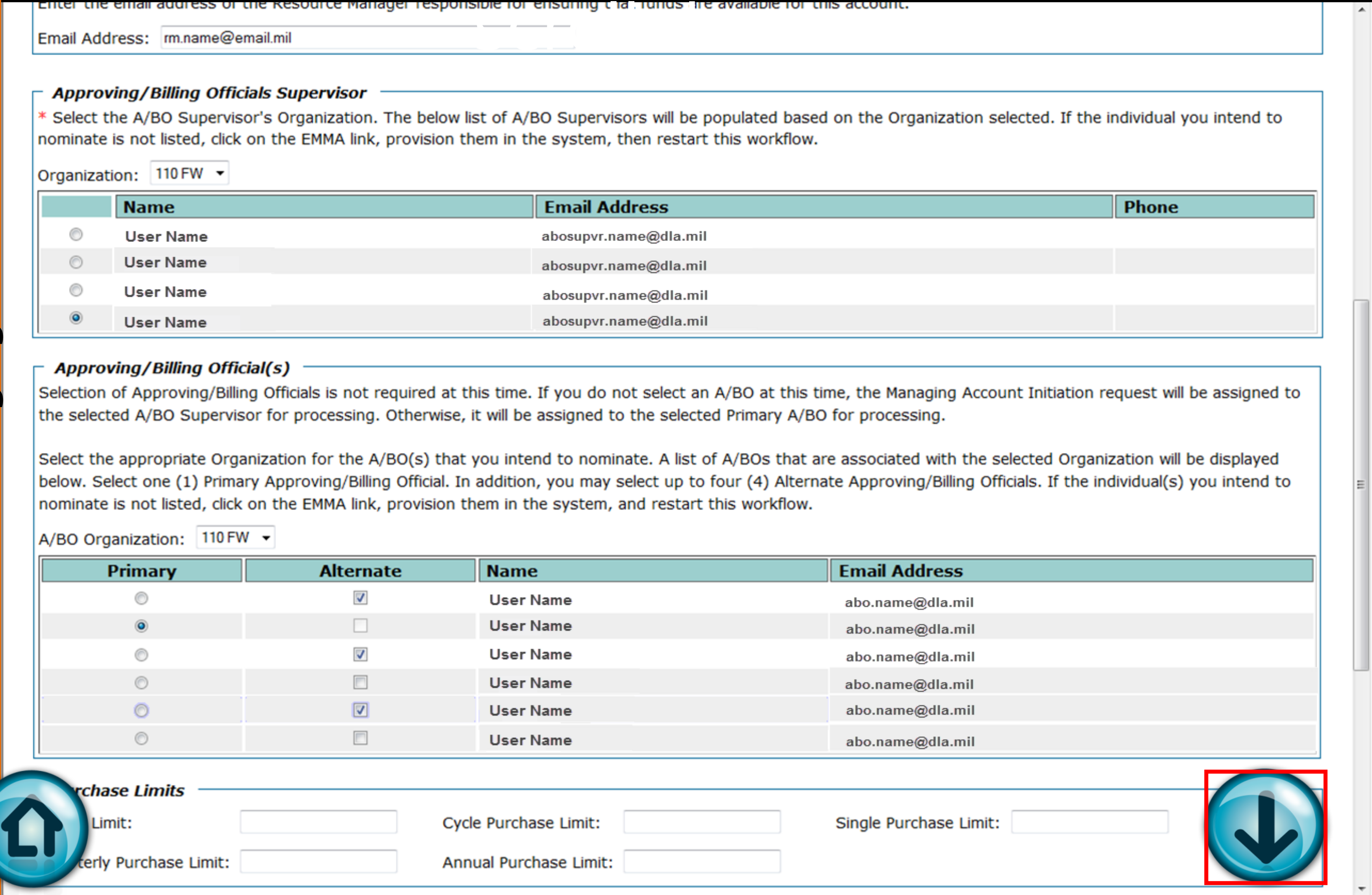
Single Purchase Limit:

erly Purchase Limit:

Annual Purchase Limit:

A/OPC Action 1 AIM: Initiate Request for New Managing Account

All users have been assigned to the managing account. Click the arrow to



Enter the email address of the Resource Manager responsible for ensuring that funds are available for this account.

Email Address: rm.name@email.mil

Approving/Billing Officials Supervisor

* Select the A/BO Supervisor's Organization. The below list of A/BO Supervisors will be populated based on the Organization selected. If the individual you intend to nominate is not listed, click on the EMMA link, provision them in the system, then restart this workflow.

Organization: 110 FW

	Name	Email Address	Phone
○	User Name	abosupvr.name@dla.mil	
○	User Name	abosupvr.name@dla.mil	
○	User Name	abosupvr.name@dla.mil	
●	User Name	abosupvr.name@dla.mil	

Approving/Billing Official(s)

Selection of Approving/Billing Officials is not required at this time. If you do not select an A/BO at this time, the Managing Account Initiation request will be assigned to the selected A/BO Supervisor for processing. Otherwise, it will be assigned to the selected Primary A/BO for processing.

Select the appropriate Organization for the A/BO(s) that you intend to nominate. A list of A/BOs that are associated with the selected Organization will be displayed below. Select one (1) Primary Approving/Billing Official. In addition, you may select up to four (4) Alternate Approving/Billing Officials. If the individual(s) you intend to nominate is not listed, click on the EMMA link, provision them in the system, and restart this workflow.

A/BO Organization: 110 FW

Primary	Alternate	Name	Email Address
○	☑	User Name	abo.name@dla.mil
●	☐	User Name	abo.name@dla.mil
○	☑	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☑	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil

rchase Limits

Limit:

Cycle Purchase Limit:

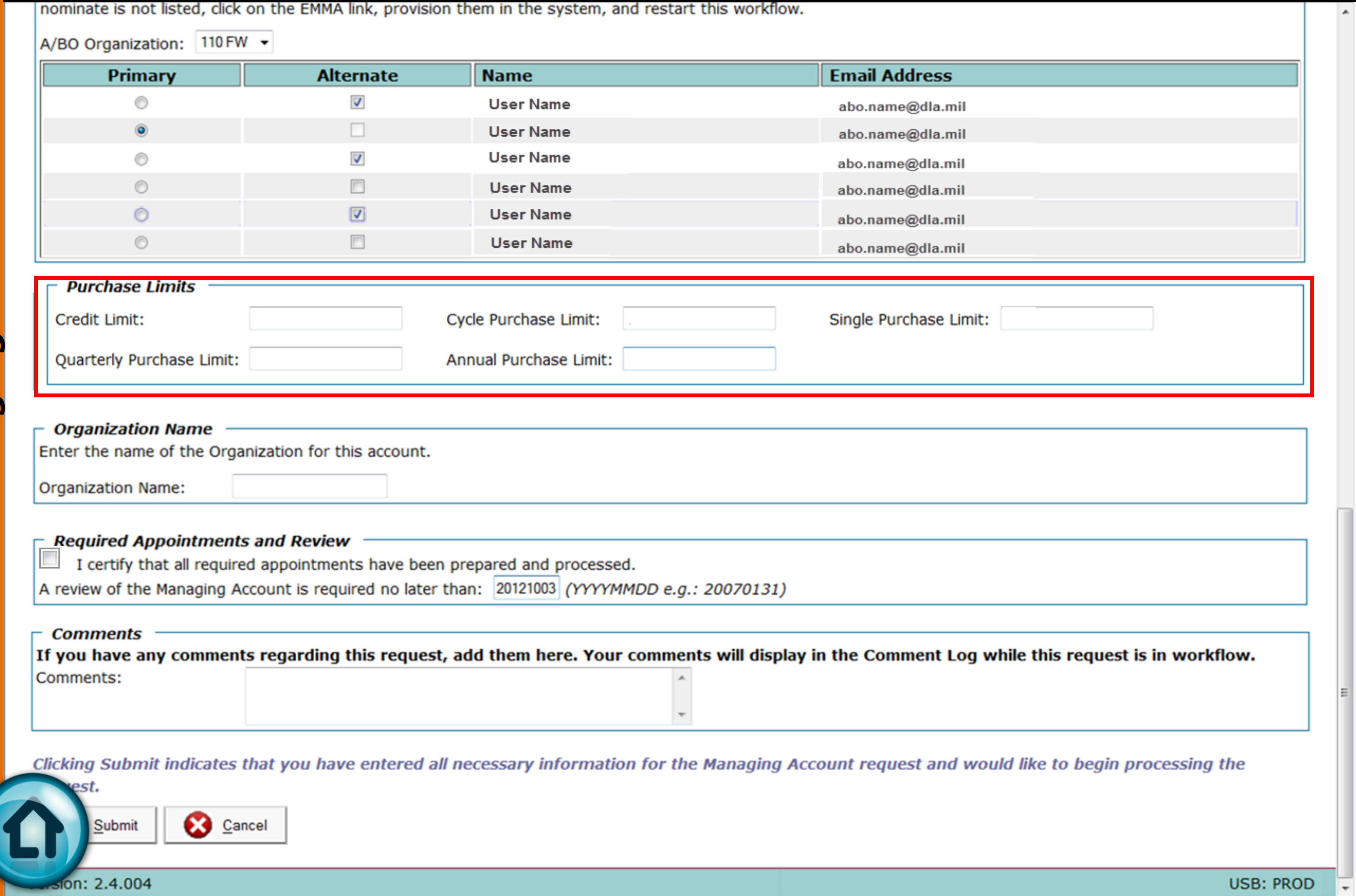
Single Purchase Limit:

terly Purchase Limit:

Annual Purchase Limit:

A/OPC Action 1 AIM: Initiate Request for New Managing Account

The A/OPC has the option to enter the **Purchase Limits**. Click one of the Purchase Limits boxes.



nominate is not listed, click on the EMMA link, provision them in the system, and restart this workflow.

A/BO Organization: 110 FW

Primary	Alternate	Name	Email Address
○	☑	User Name	abo.name@dla.mil
●	☐	User Name	abo.name@dla.mil
○	☑	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☑	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil

Purchase Limits

Credit Limit:

Cycle Purchase Limit:

Single Purchase Limit:

Quarterly Purchase Limit:

Annual Purchase Limit:

Organization Name

Enter the name of the Organization for this account.

Organization Name:

Required Appointments and Review

☐ I certify that all required appointments have been prepared and processed.

A review of the Managing Account is required no later than: 20121003 *(YYYYMMDD e.g.: 20070131)*

Comments

If you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in workflow.

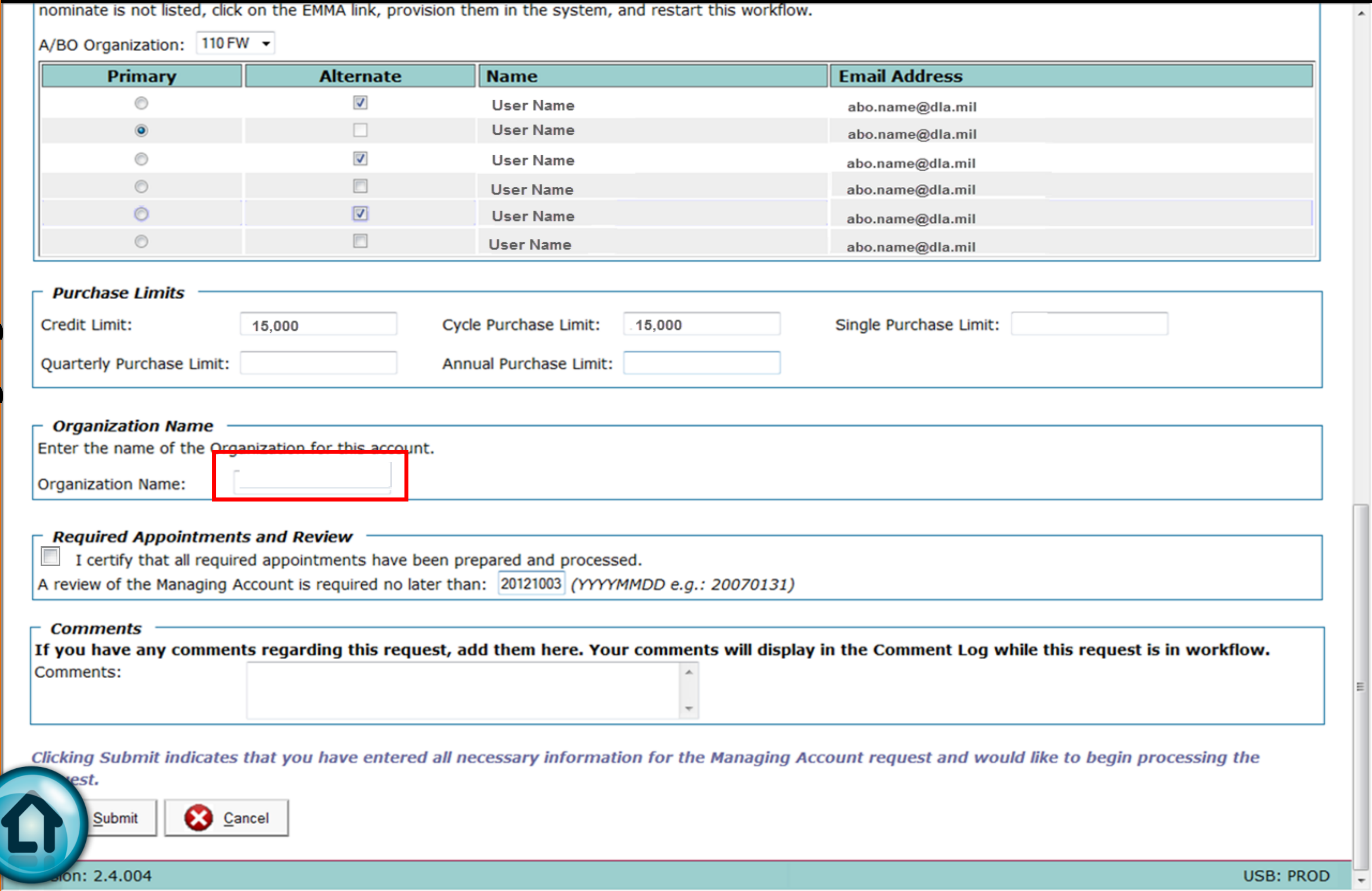
Comments:

Clicking Submit indicates that you have entered all necessary information for the Managing Account request and would like to begin processing the
est.

sion: 2.4.004

USB: PROD

The A/OPC has entered the **Purchase Limits**. The A/OPC also has the option to enter the **Organization Name**. Click on the Organization Name box.



nominate is not listed, click on the EMMA link, provision them in the system, and restart this workflow.

A/BO Organization: 110 FW

Primary	Alternate	Name	Email Address
○	☑	User Name	abo.name@dla.mil
●	☐	User Name	abo.name@dla.mil
○	☑	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☑	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil

Purchase Limits

Credit Limit: 15,000

Cycle Purchase Limit: 15,000

Single Purchase Limit:

Quarterly Purchase Limit:

Annual Purchase Limit:

Organization Name

Enter the name of the Organization for this account.

Organization Name:

Required Appointments and Review

☐ I certify that all required appointments have been prepared and processed.

A review of the Managing Account is required no later than: 20121003 *(YYYYMMDD e.g.: 20070131)*

Comments

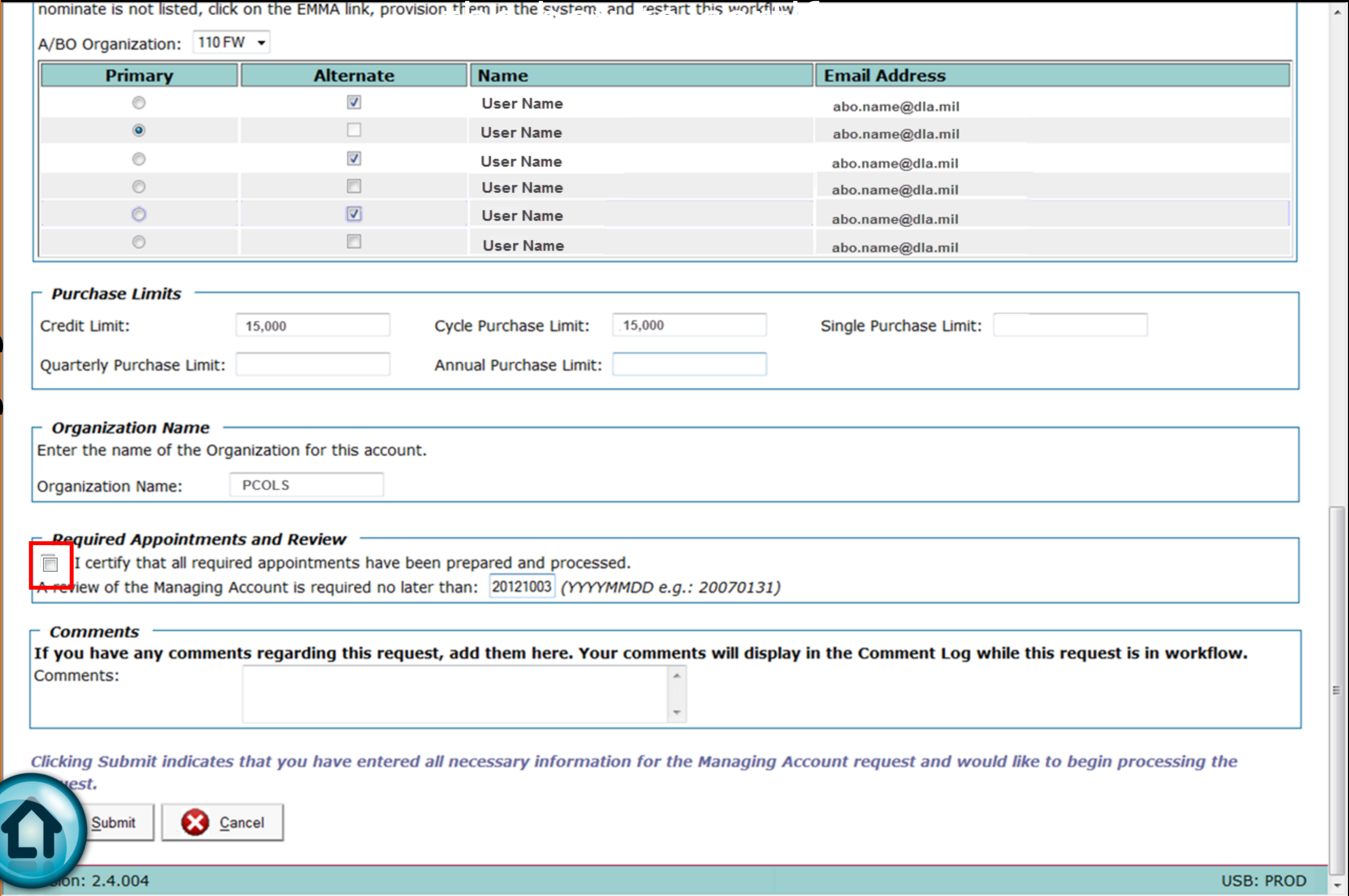
If you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in workflow.

Comments:

Clicking Submit indicates that you have entered all necessary information for the Managing Account request and would like to begin processing the
est.

A/OPC Action 1 AIM: Initiate Request for New Managing Account

The A/OPC has entered the **Organization Name.** The A/OPC has the option to enter the **Required Appointments and Review** information. Click on



nominate is not listed, click on the EMMA link, provision them in the system, and restart this workflow.

A/BO Organization: 110 FW

Primary	Alternate	Name	Email Address
○	☑	User Name	abo.name@dla.mil
●	☐	User Name	abo.name@dla.mil
○	☑	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil
○	☑	User Name	abo.name@dla.mil
○	☐	User Name	abo.name@dla.mil

Purchase Limits

Credit Limit: 15,000
Cycle Purchase Limit: 15,000
Single Purchase Limit:
Quarterly Purchase Limit:
Annual Purchase Limit:

Organization Name

Enter the name of the Organization for this account.

Organization Name: PCOLS

Required Appointments and Review

☐ I certify that all required appointments have been prepared and processed.

A review of the Managing Account is required no later than: 20121003 *(YYYYMMDD e.g.: 20070131)*

Comments

If you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in workflow.

Comments:

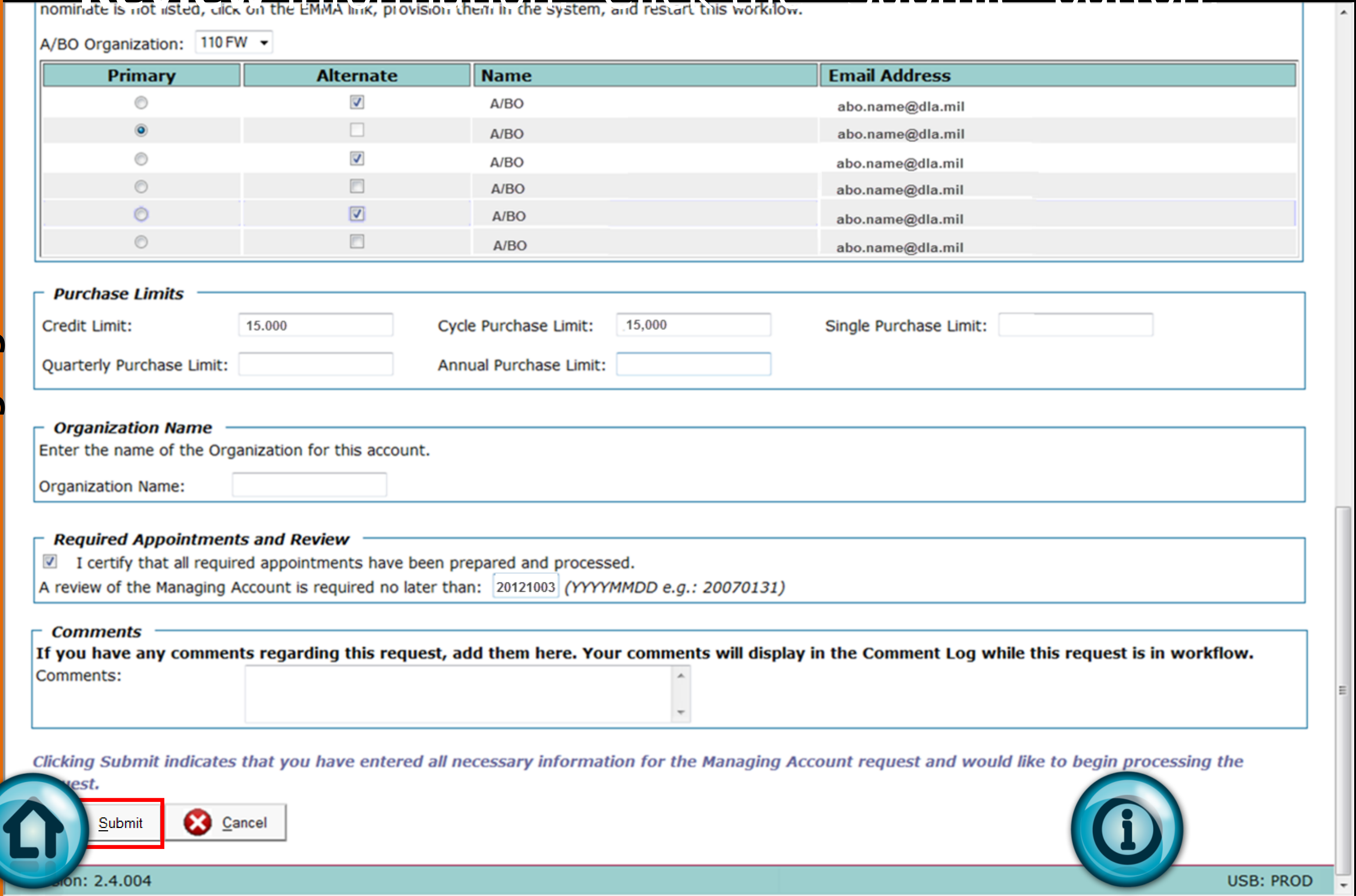
Clicking Submit indicates that you have entered all necessary information for the Managing Account request and would like to begin processing the request.

Version: 2.4.004

USB: PROD

The A/OPC has checked the box and entered the date for the **Required Appointments and Review** information. Click the “Submit” button.

A/OPC Action 1 AIM: Initiate Request for New Managing Account



nominate is not listed, click on the EMMA link, provision them in the system, and restart this workflow.

A/BO Organization: 110 FW

Primary	Alternate	Name	Email Address
○	☑	A/BO	abo.name@dla.mil
●	☐	A/BO	abo.name@dla.mil
○	☑	A/BO	abo.name@dla.mil
○	☐	A/BO	abo.name@dla.mil
○	☑	A/BO	abo.name@dla.mil
○	☐	A/BO	abo.name@dla.mil

Purchase Limits

Credit Limit: 15.000

Cycle Purchase Limit: 15,000

Single Purchase Limit:

Quarterly Purchase Limit:

Annual Purchase Limit:

Organization Name

Enter the name of the Organization for this account.

Organization Name:

Required Appointments and Review

☑ I certify that all required appointments have been prepared and processed.

A review of the Managing Account is required no later than: 20121003 *(YYYYMMDD e.g.: 20070131)*

Comments

If you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in workflow.

Comments:

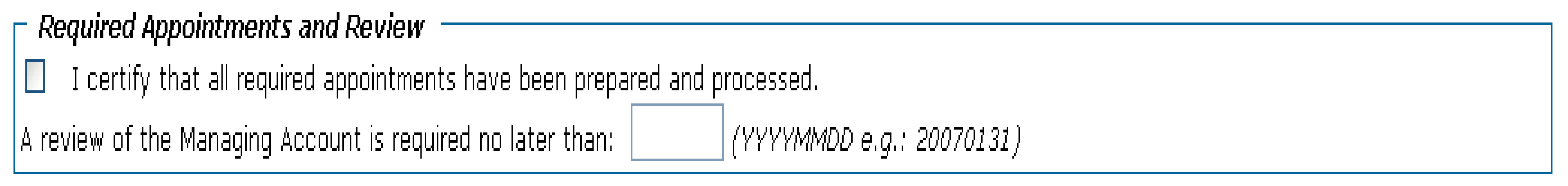
Clicking Submit indicates that you have entered all necessary information for the Managing Account request and would like to begin processing the est.

sion: 2.4.004

USB: PROD

Required Appointments and Review – The A/OPC has the option to enter information for Required Appointments and Review. Clicking the check box verifies that all required appointments have been prepared and processed. The A/OPC enters a date by which they will complete a review of the Managing Account.

Note: During the Managing Account creation step, this is optional; however, the fields will be required in the Managing Account Approval step. In the future, the A/OPC will receive an email 60 and 30 days prior to the Annual Managing Account Review due date. On the review expiration date, the A/OPC will receive an email that the review is past due. Once the review is complete, it is the A/OPC's responsibility to update the review date in AIM.



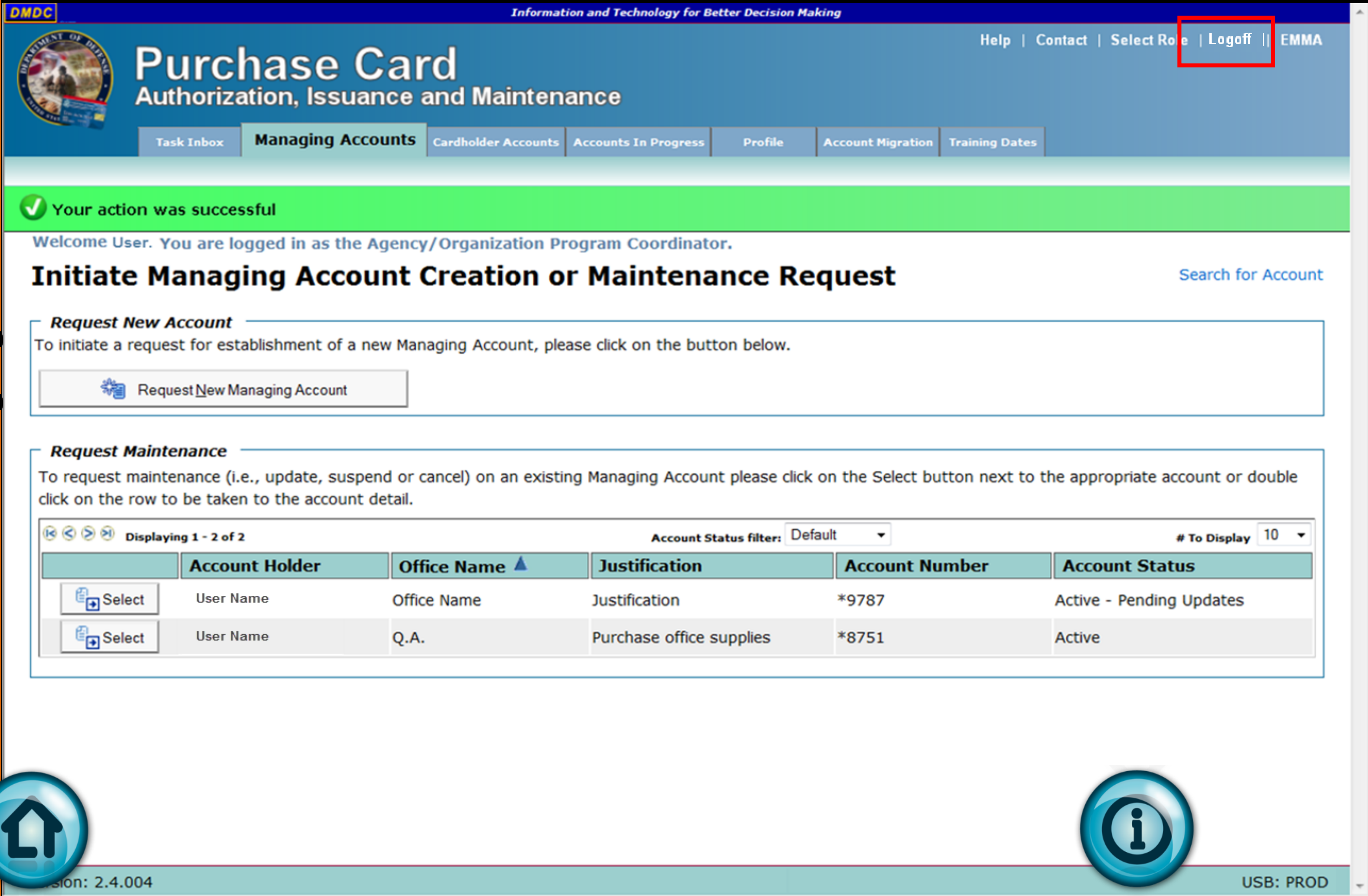
Required Appointments and Review

☐ I certify that all required appointments have been prepared and processed.

A review of the Managing Account is required no later than: *(YYYYMMDD e.g.: 20070131)*

Tip: A/OPC's can reference section 8.13 of the AIM User Manual, Updating Appointments and Review Date, for additional information

The action was successful. Click the "Logoff" link.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff || EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile
Account Migration
Training Dates
Search for Account
Request New Managing Account
Displaying 1 - 2 of 2
Select

✓ Your action was successful

Welcome User. You are logged in as the Agency/Organization Program Coordinator.

Initiate Managing Account Creation or Maintenance Request

Request New Account

To initiate a request for establishment of a new Managing Account, please click on the button below.

Request Maintenance

To request maintenance (i.e., update, suspend or cancel) on an existing Managing Account please click on the Select button next to the appropriate account or double click on the row to be taken to the account detail.

Account Status filter: Default

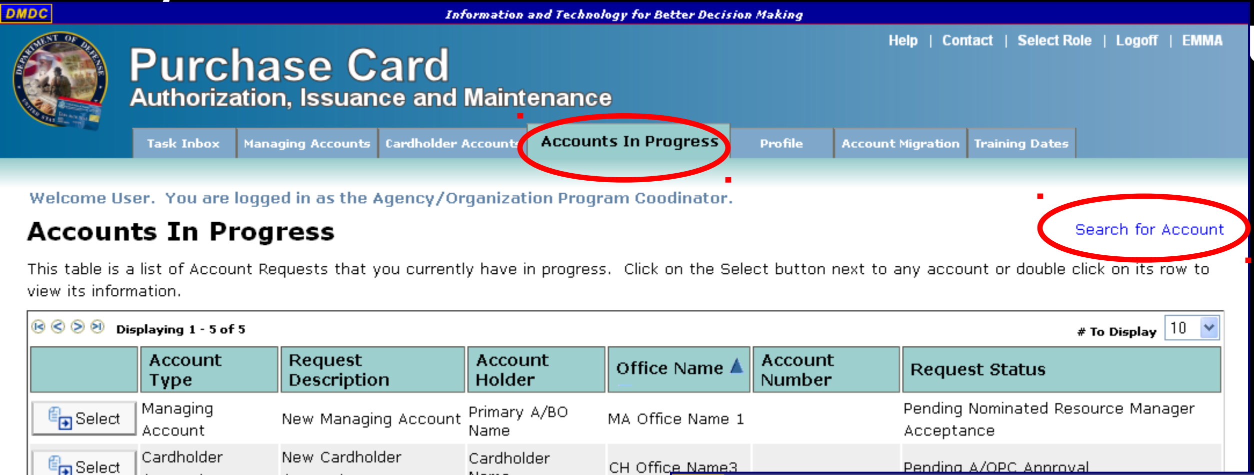
To Display 10

	Account Holder	Office Name	Justification	Account Number	Account Status
Select	User Name	Office Name	Justification	*9787	Active - Pending Updates
Select	User Name	Q.A.	Purchase office supplies	*8751	Active

sion: 2.4.004

USB: PROD

At any point in the workflow, the status of the new managing account can be found in the "Accounts in Progress" tab. The "Search for Account" feature can be ular account.



DMDC *Information and Technology for Better Decision Making*

Help | Contact | Select Role | Logoff | EMMA

Purchase Card
Authorization, Issuance and Maintenance

Task Inbox | Managing Accounts | Cardholder Accounts | Accounts In Progress | Profile | Account Migration | Training Dates

Welcome User. You are logged in as the Agency/Organization Program Coodinator.

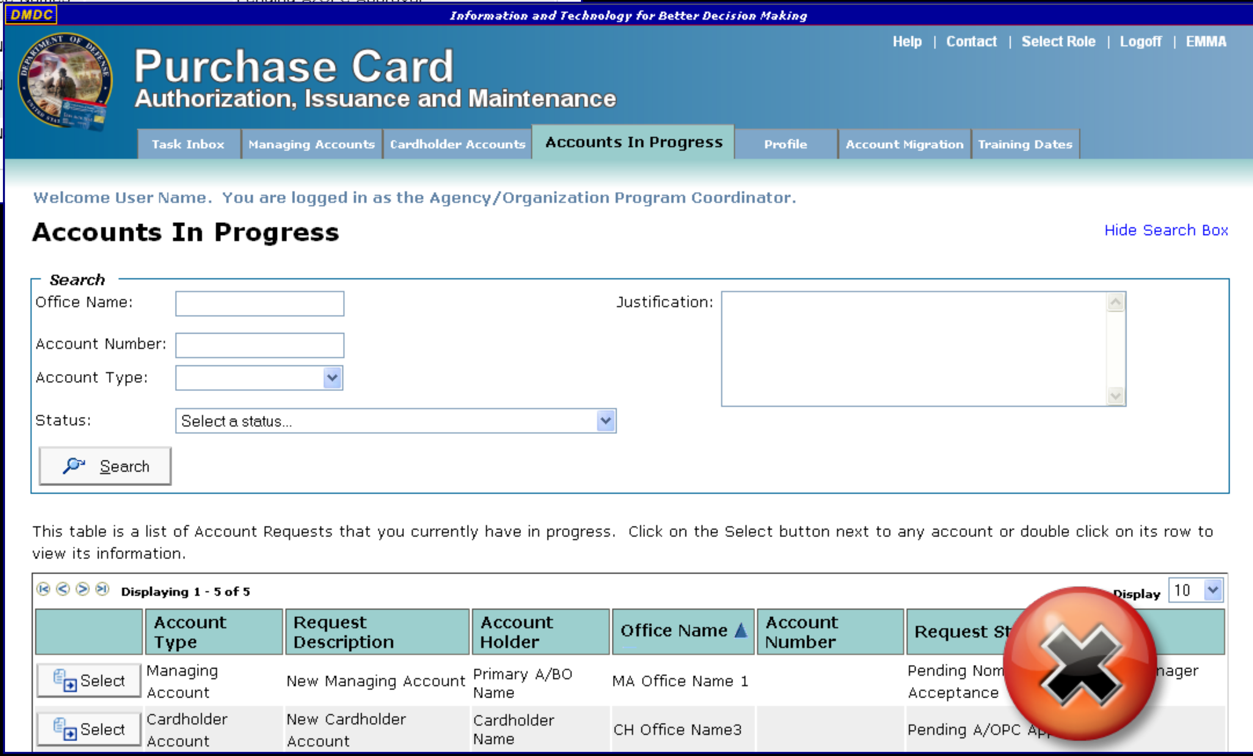
Accounts In Progress

Search for Account

This table is a list of Account Requests that you currently have in progress. Click on the Select button next to any account or double click on its row to view its information.

Displaying 1 - 5 of 5 # To Display 10

	Account Type	Request Description	Account Holder	Office Name ▲	Account Number	Request Status
Select	Managing Account	New Managing Account	Primary A/BO Name	MA Office Name 1		Pending Nominated Resource Manager Acceptance
Select	Cardholder Account	New Cardholder Account	Cardholder Name	CH Office Name3		Pending A/OPC Approval
Select	Cardholder Account	New Cardholder Account		Office N		
Select	Managing Account	Update Organization Name	Primary A/BO Name	Office N 011811		
Select	Cardholder Account	New Cardholder Account	Cardholder Name	Office N 011911		



DMDC *Information and Technology for Better Decision Making*

Help | Contact | Select Role | Logoff | EMMA

Purchase Card
Authorization, Issuance and Maintenance

Task Inbox | Managing Accounts | Cardholder Accounts | Accounts In Progress | Profile | Account Migration | Training Dates

Welcome User Name. You are logged in as the Agency/Organization Program Coordinator.

Accounts In Progress

Hide Search Box

Search

Office Name:
Account Number:
Account Type:
Status: Select a status...
Justification:

Search

This table is a list of Account Requests that you currently have in progress. Click on the Select button next to any account or double click on its row to view its information.

Displaying 1 - 5 of 5 Display 10

	Account Type	Request Description	Account Holder	Office Name ▲	Account Number	Request St
Select	Managing Account	New Managing Account	Primary A/BO Name	MA Office Name 1		Pending Nom nager Acceptance
Select	Cardholder Account	New Cardholder Account	Cardholder Name	CH Office Name3		Pending A/OPC Ap

TIP: To perform a keyword search for **Office Name**, **Account Number**, or **Justification**, enter an asterisk (*), at least three characters of the keyword or four digits of the account number, and another asterisk (*). This function is also case sensitive. For example, to perform a keyword search for an office named "Sample

A/OPC Action 1 AIM: Initiate Request for New Managing Account

A/OPC Action 1

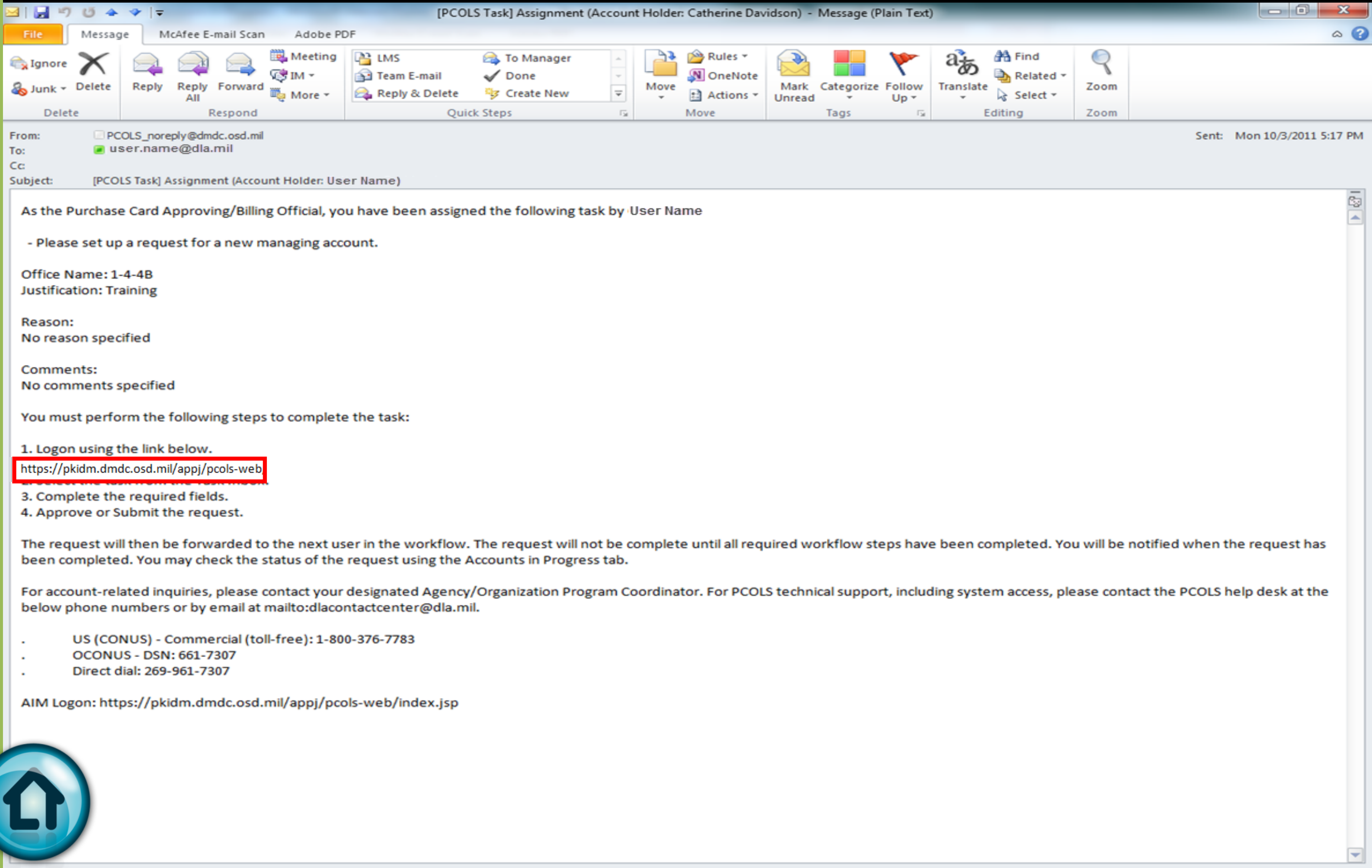
Complete

A/BO Action 1

AIM: Complete Set-up Request for New Managing Account

A/BO Action 1 AIM: Complete Set-up Request for New MA

The A/BO has received a PCOLS Task email to “set up a request for a new managing account.” Click on the link to complete the task.


[PCOLS Task] Assignment (Account Holder: Catherine Davidson) - Message (Plain Text)
File
Message
McAfee E-mail Scan
Adobe PDF
Ignore
Junk
Delete
Reply
Reply All
Forward
Meeting
IM
More
Respond
LMS
Team E-mail
Reply & Delete
To Manager
Done
Create New
Quick Steps
Move
Rules
OneNote
Actions
Mark Unread
Categorize
Follow Up
Tags
Translate
Find
Related
Select
Editing
Zoom

From: PCOLS_noreply@dmdc.osd.mil
To: user.name@dla.mil
Cc:
Subject: [PCOLS Task] Assignment (Account Holder: User Name)
Sent: Mon 10/3/2011 5:17 PM

As the Purchase Card Approving/Billing Official, you have been assigned the following task by User Name

- Please set up a request for a new managing account.

Office Name: 1-4-4B
Justification: Training

Reason:
No reason specified

Comments:
No comments specified

You must perform the following steps to complete the task:

1. Logon using the link below.
https://pkidm.dmdc.osd.mil/appj/pcols-web
3. Complete the required fields.
4. Approve or Submit the request.

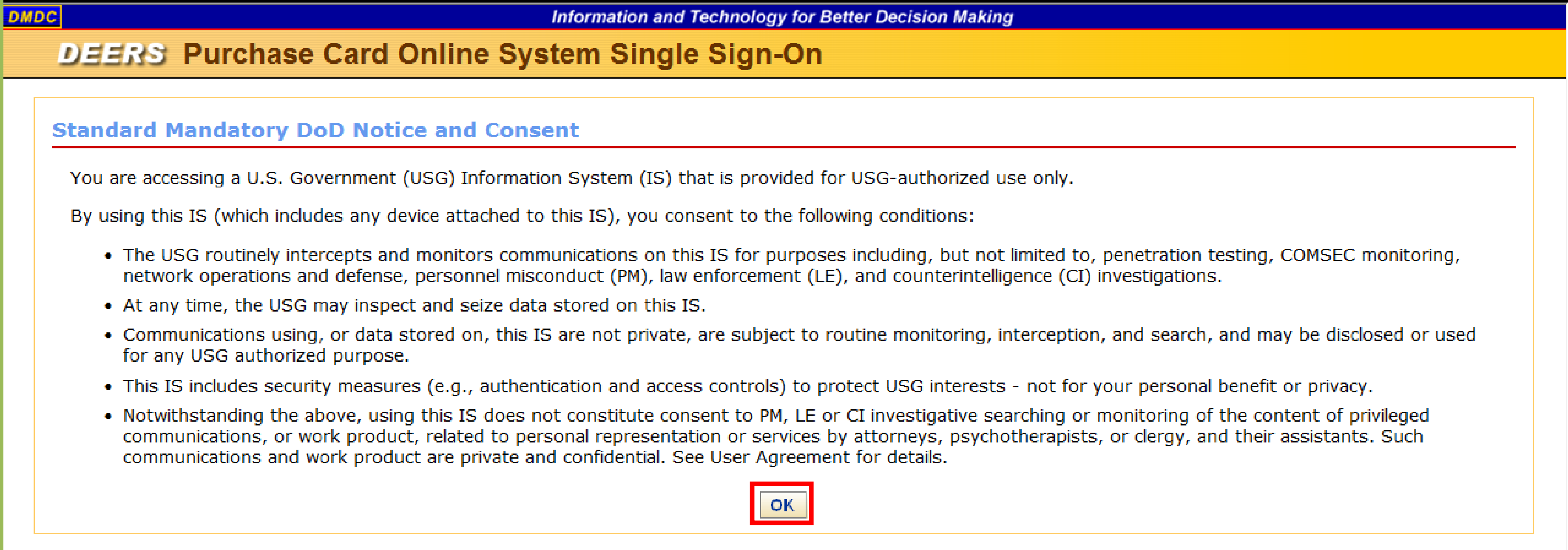
The request will then be forwarded to the next user in the workflow. The request will not be complete until all required workflow steps have been completed. You will be notified when the request has been completed. You may check the status of the request using the Accounts in Progress tab.

For account-related inquiries, please contact your designated Agency/Organization Program Coordinator. For PCOLS technical support, including system access, please contact the PCOLS help desk at the below phone numbers or by email at mailto:dlacontactcenter@dla.mil.

- US (CONUS) - Commercial (toll-free): 1-800-376-7783
- OCONUS - DSN: 661-7307
- Direct dial: 269-961-7307

AIM Logon: https://pkidm.dmdc.osd.mil/appj/pcols-web/index.jsp

Click the “OK” button.


DMDC
Information and Technology for Better Decision Making
DEERS Purchase Card Online System Single Sign-On

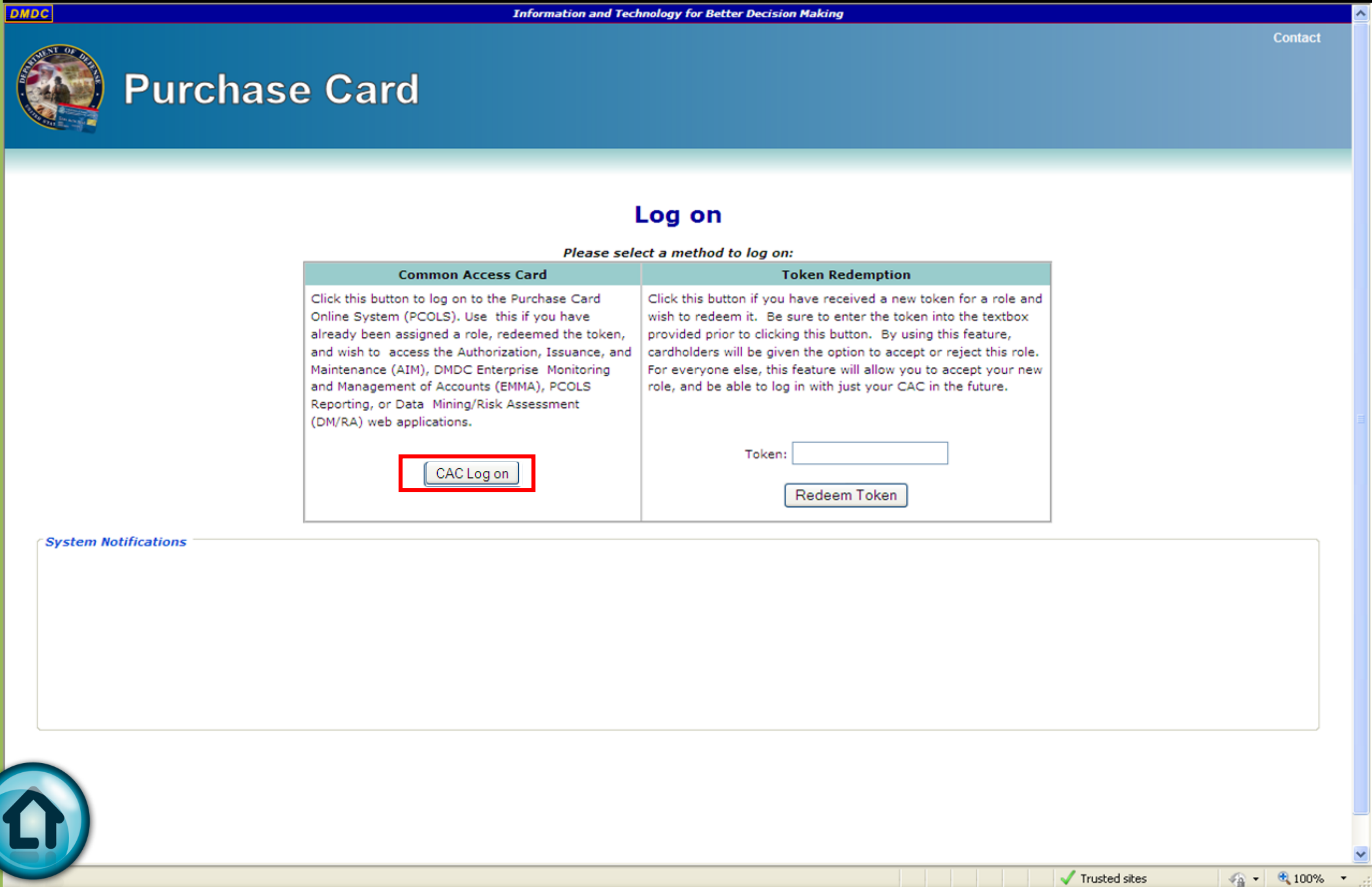
Standard Mandatory DoD Notice and Consent

You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only.

By using this IS (which includes any device attached to this IS), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests - not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential. See User Agreement for details.

Click the “CAC Log on” button


DMDC
Information and Technology for Better Decision Making
Contact
Purchase Card

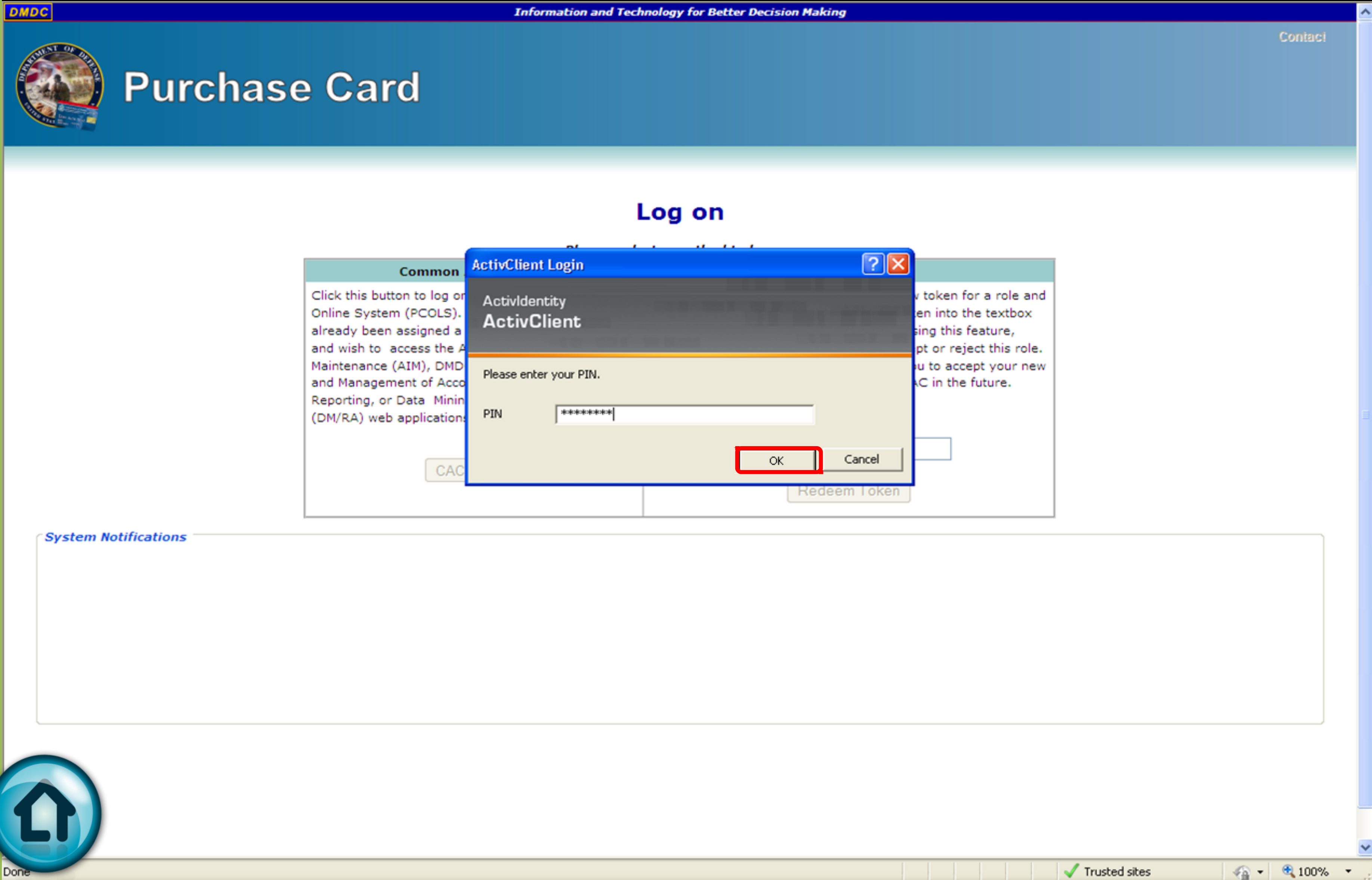
Log on

Please select a method to log on:

Common Access Card	Token Redemption
Click this button to log on to the Purchase Card Online System (PCOLS). Use this if you have already been assigned a role, redeemed the token, and wish to access the Authorization, Issuance, and Maintenance (AIM), DMDC Enterprise Monitoring and Management of Accounts (EMMA), PCOLS Reporting, or Data Mining/Risk Assessment (DM/RA) web applications.	Click this button if you have received a new token for a role and wish to redeem it. Be sure to enter the token into the textbox provided prior to clicking this button. By using this feature, cardholders will be given the option to accept or reject this role. For everyone else, this feature will allow you to accept your new role, and be able to log in with just your CAC in the future.
	Token:

CAC Log on
Redeem Token
System Notifications
Trusted sites
100%

The A/BO has entered their PIN. Click the “OK” button.


DMDC
Information and Technology for Better Decision Making
Contact
Purchase Card
Log on
Common
ActivClient Login
ActivIdentity
ActivClient
PIN
OK
Cancel
CAC
Redeem Token
System Notifications
Done
Trusted sites
100%

Click this button to log on
Online System (PCOLS).
already been assigned a
and wish to access the A
Maintenance (AIM), DMD
and Management of Acco
Reporting, or Data Minin
(DM/RA) web applications

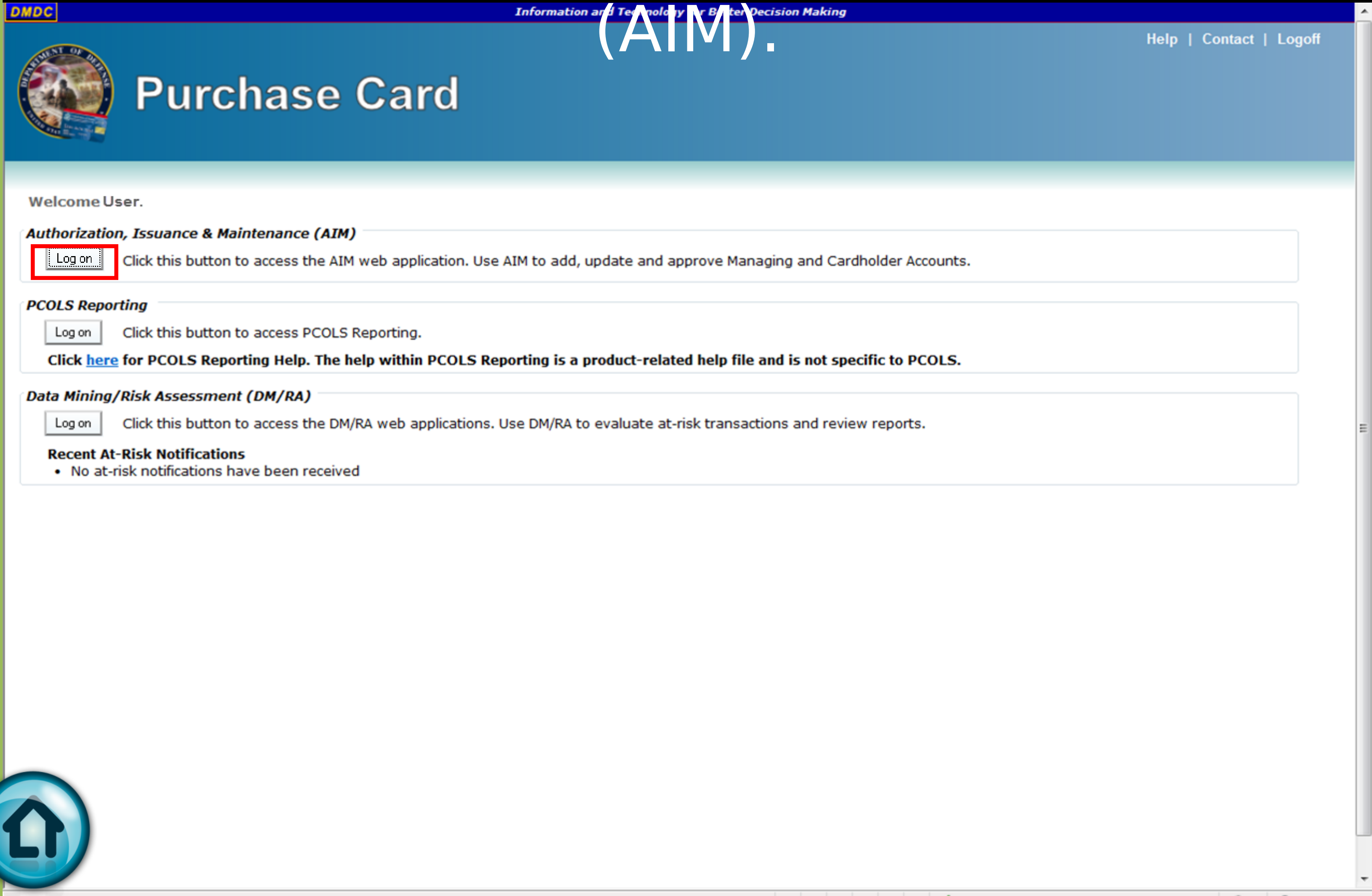
token for a role and
en into the textbox
sing this feature,
pt or reject this role.
u to accept your new
C in the future.

Please enter your PIN.

PIN *********

A/BO Action 1 AIM: Complete Set-up Request for New MA

Click on the “Log on” button for Authorization, Issuance & Maintenance (AIM).



DMDC
Information and Technology for Better Decision Making
Help | Contact | Logoff
Purchase Card

Welcome User.

Authorization, Issuance & Maintenance (AIM)

Log on Click this button to access the AIM web application. Use AIM to add, update and approve Managing and Cardholder Accounts.

PCOLS Reporting

Log on Click this button to access PCOLS Reporting.

Click here for PCOLS Reporting Help. The help within PCOLS Reporting is a product-related help file and is not specific to PCOLS.

Data Mining/Risk Assessment (DM/RA)

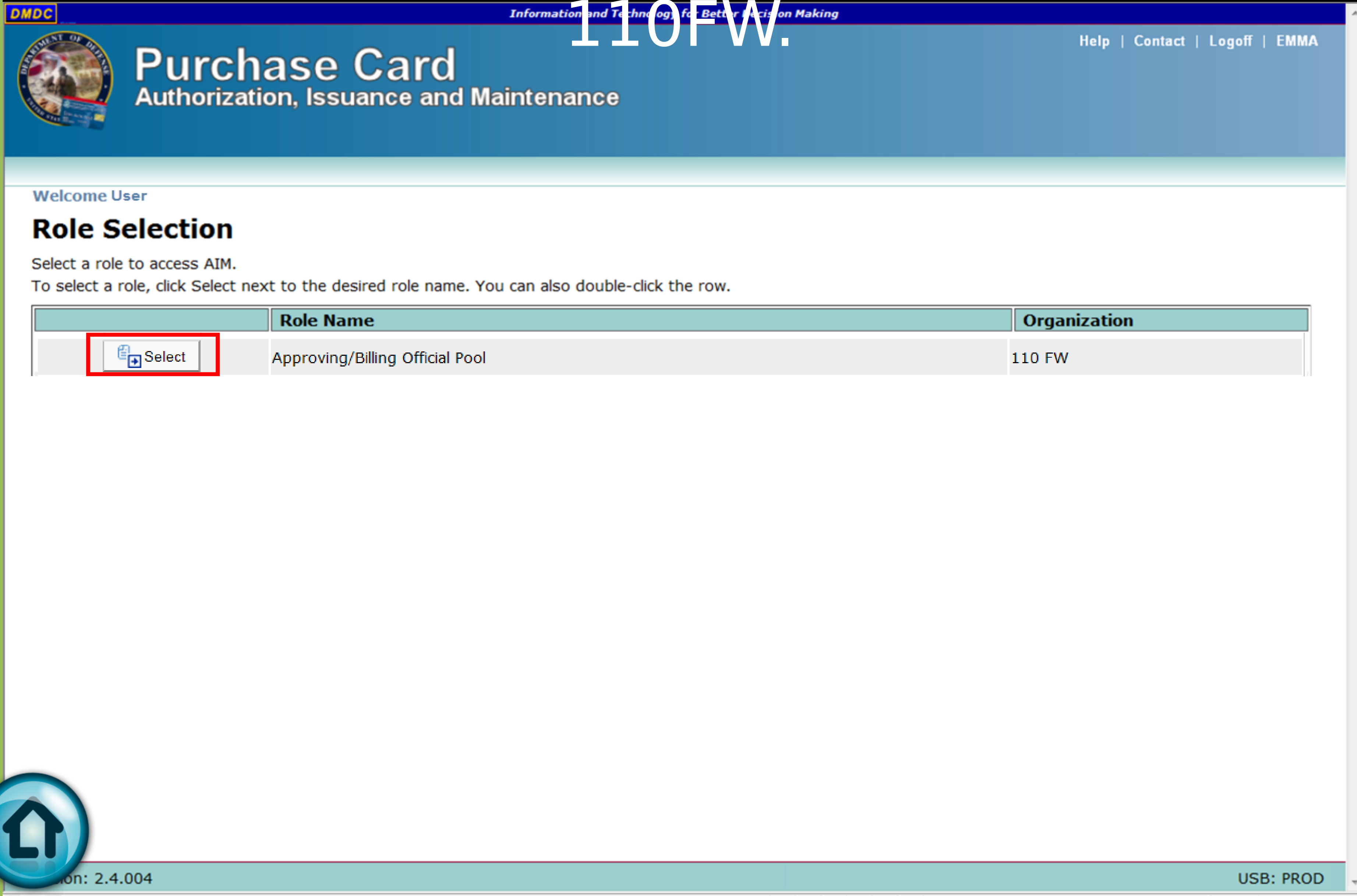
Log on Click this button to access the DM/RA web applications. Use DM/RA to evaluate at-risk transactions and review reports.

Recent At-Risk Notifications

- No at-risk notifications have been received

Click the “Select” button for the **Approving/Billing Official Pool** role for 110FW.

A/BO Action 1 AIM: Complete Set-up Request for New MA



DMDC

Information and Technology for Better Decision Making

Help | Contact | Logoff | EMMA

Purchase Card

Authorization, Issuance and Maintenance

Welcome User

Role Selection

Select a role to access AIM.

To select a role, click Select next to the desired role name. You can also double-click the row.

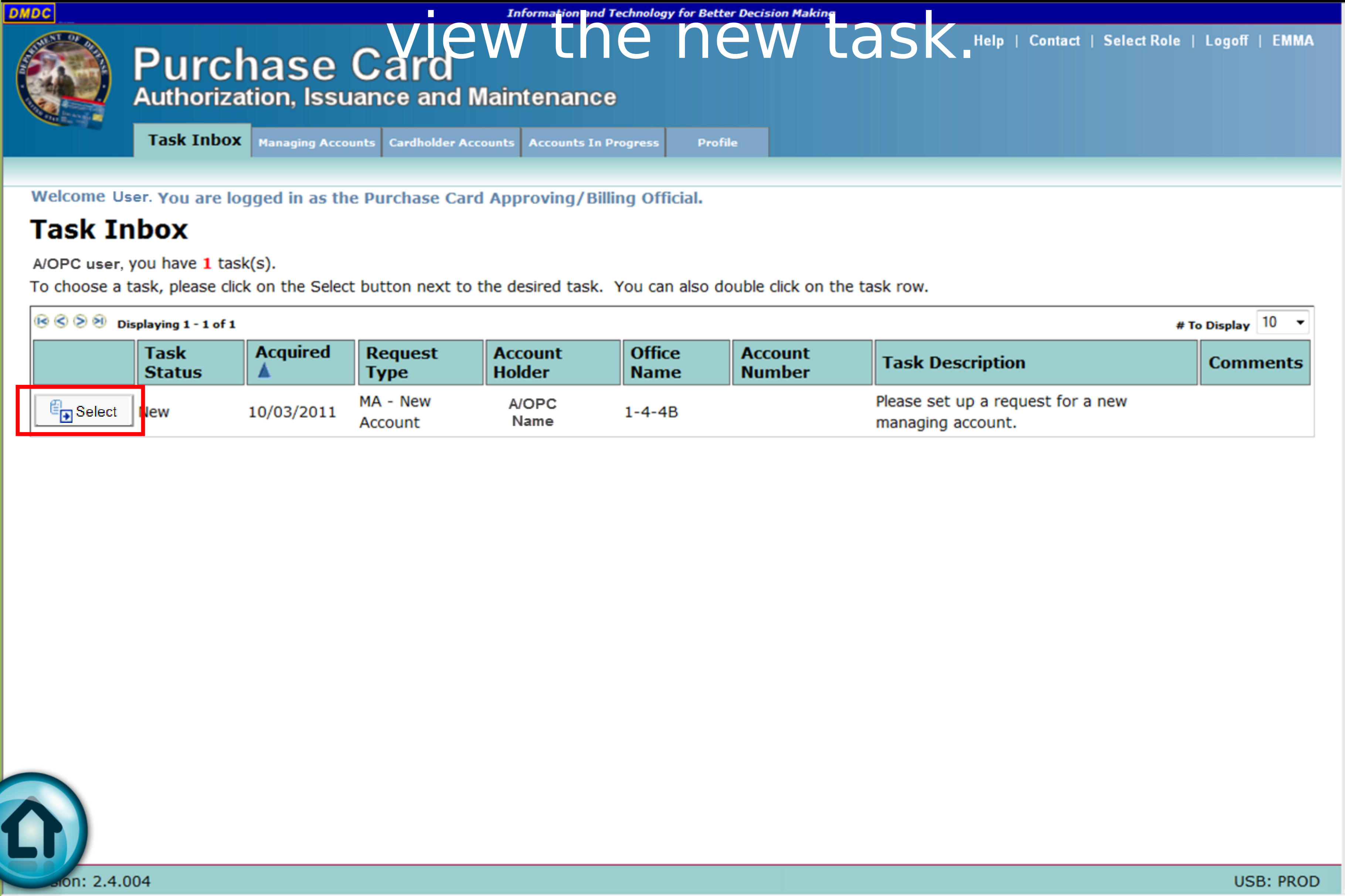
	Role Name	Organization
Select	Approving/Billing Official Pool	110 FW

ion: 2.4.004

USB: PROD

A/BO Action 1 AIM: Complete Set-up Request for New MA

The A/BO has been directed to their Task Inbox. Click on the "Select" button to view the new task.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

Welcome User. You are logged in as the Purchase Card Approving/Billing Official.

Task Inbox

A/OPC user, you have 1 task(s).

To choose a task, please click on the Select button next to the desired task. You can also double click on the task row.

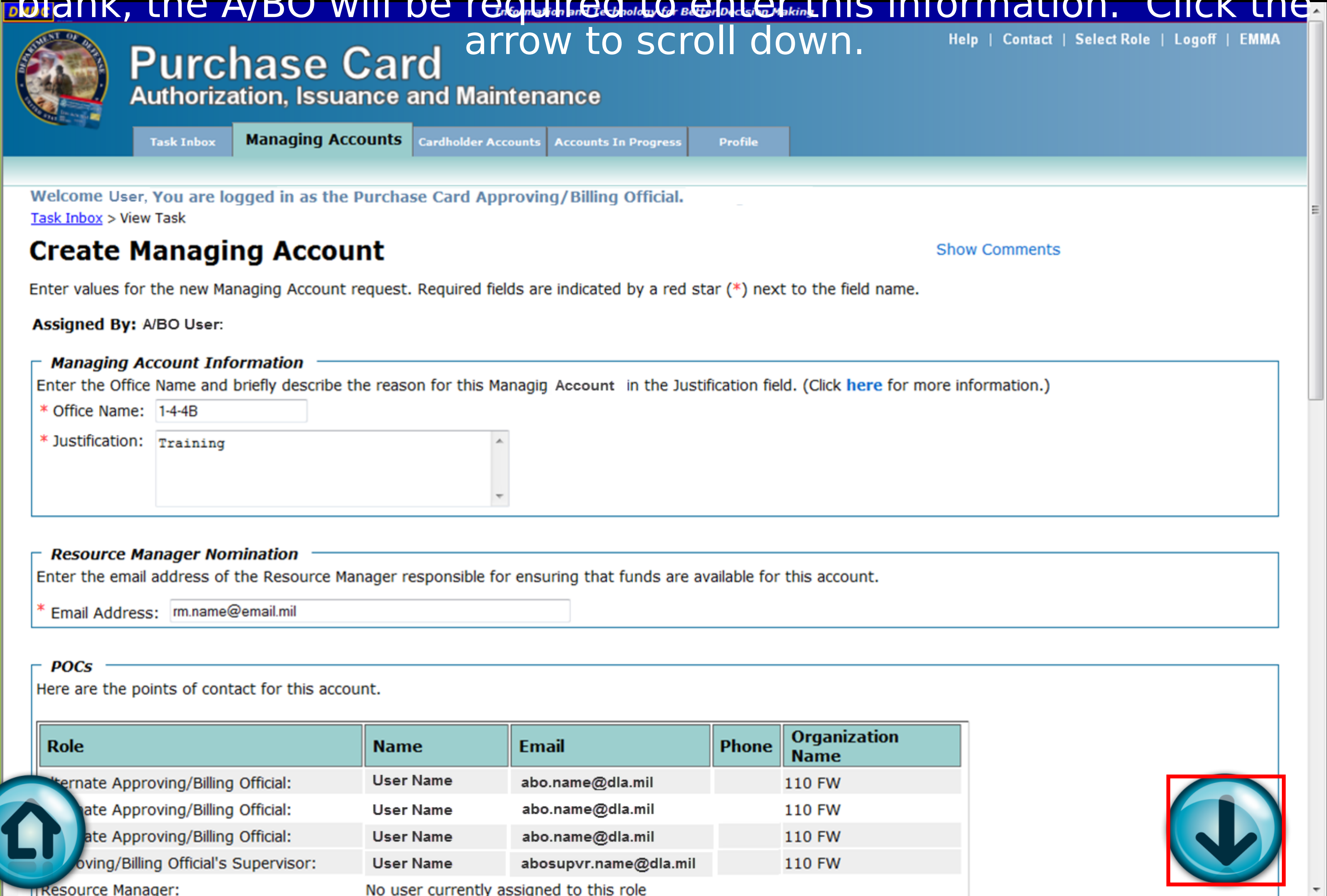
Displaying 1 - 1 of 1 # To Display 10

	Task Status	Acquired	Request Type	Account Holder	Office Name	Account Number	Task Description	Comments
Select	New	10/03/2011	MA - New Account	A/OPC Name	1-4-4B		Please set up a request for a new managing account.	

Version: 2.4.004 USB: PROD

A/BO Action 1 AIM: Complete Set-up Request for New MA

The A/BO is directed to the **Create Managing Account** screen. The **Office Name**, **Justification**, and **Resource Manager Nomination** have been entered by the A/OPC. If these fields are blank, the A/BO will be required to enter this information. Click the arrow to scroll down.


DAAS
Information and Technology for Better Decision Making
Purchase Card
Authorization, Issuance and Maintenance
Help | Contact | Select Role | Logoff | EMMA
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

Welcome User, You are logged in as the Purchase Card Approving/Billing Official.

Task Inbox > View Task

Create Managing Account

Show Comments

Enter values for the new Managing Account request. Required fields are indicated by a red star (*) next to the field name.

Assigned By: A/BO User:

Managing Account Information

Enter the Office Name and briefly describe the reason for this Managig Account in the Justification field. (Click here for more information.)

* Office Name: 1-4-4B

* Justification: Training

Resource Manager Nomination

Enter the email address of the Resource Manager responsible for ensuring that funds are available for this account.

* Email Address: rm.name@email.mil

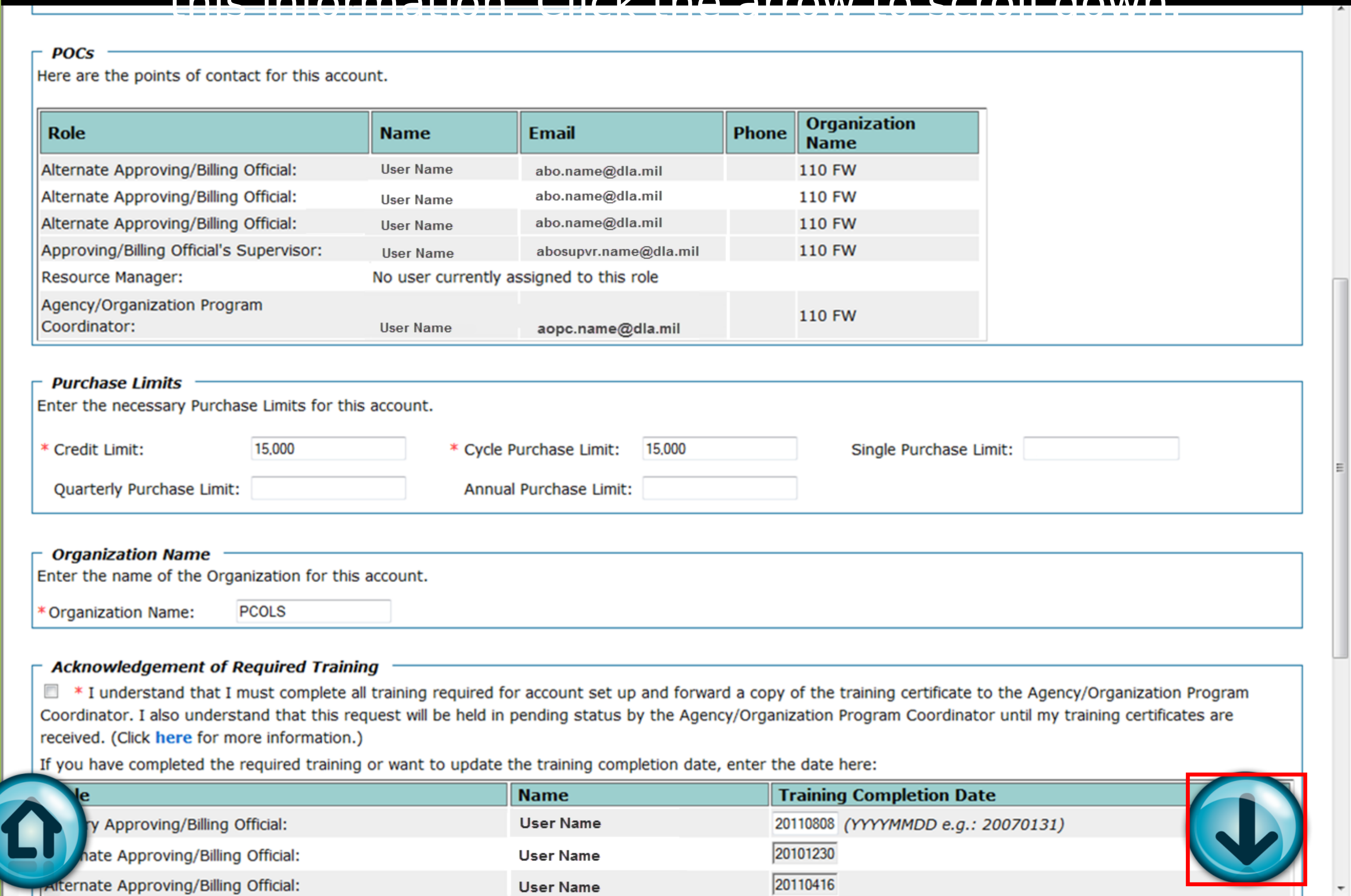
POCs

Here are the points of contact for this account.

Role	Name	Email	Phone	Organization Name
ternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
ate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
ate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
oving/Billing Official's Supervisor:	User Name	abosupvr.name@dla.mil		110 FW
Resource Manager:	No user currently assigned to this role			

A/BO Action 1 Complete Set-up Request for New MA

The POCs are listed for this account. The **Purchase Limits** and **Organization Name** have been entered by the A/OPC. If these fields are blank, the A/BO will be required to enter this information. Click the arrow to scroll down.



POCs

Here are the points of contact for this account.

Role	Name	Email	Phone	Organization Name
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Approving/Billing Official's Supervisor:	User Name	abosupvr.name@dla.mil		110 FW
Resource Manager:	No user currently assigned to this role			
Agency/Organization Program Coordinator:	User Name	aopc.name@dla.mil		110 FW

Purchase Limits

Enter the necessary Purchase Limits for this account.

* Credit Limit: 15,000

* Cycle Purchase Limit: 15,000

Single Purchase Limit:

Quarterly Purchase Limit:

Annual Purchase Limit:

Organization Name

Enter the name of the Organization for this account.

*Organization Name: PCOLS

Acknowledgement of Required Training

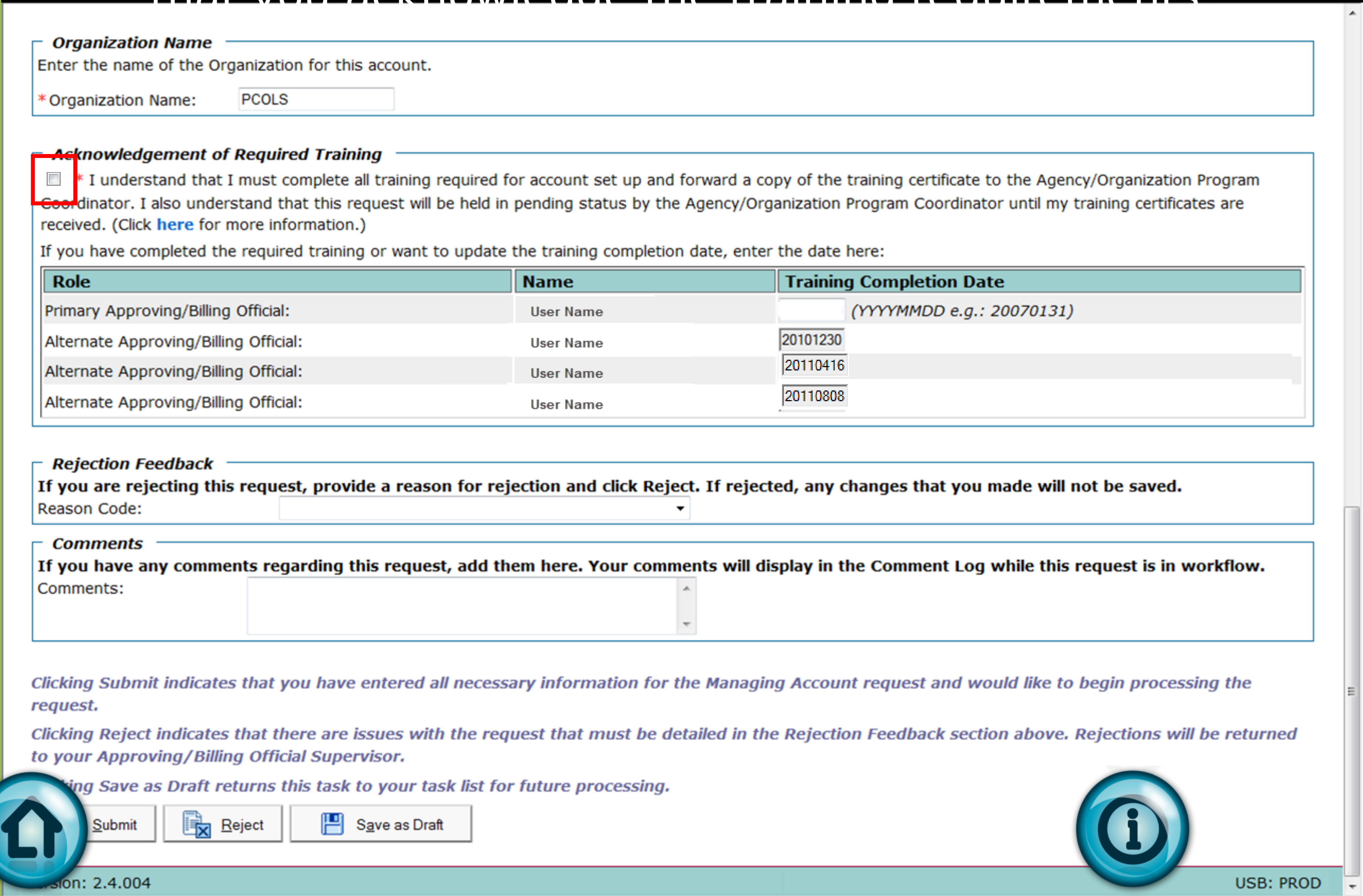
☐ * I understand that I must complete all training required for account set up and forward a copy of the training certificate to the Agency/Organization Program Coordinator. I also understand that this request will be held in pending status by the Agency/Organization Program Coordinator until my training certificates are received. (Click here for more information.)

If you have completed the required training or want to update the training completion date, enter the date here:

le	Name	Training Completion Date
y Approving/Billing Official:	User Name	20110808 (YYYYMMDD e.g.: 20070131)
nate Approving/Billing Official:	User Name	20101230
lternate Approving/Billing Official:	User Name	20110416

A/BO Action 1 Aim: Complete Set-up Request for New MA

The **Training Completion Date** for the Primary A/BO will need to be entered by the A/BO or by the A/OPC before the account is submitted to the bank. Check the box to verify that you acknowledge the training requirements.



Organization Name

Enter the name of the Organization for this account.

* Organization Name: PCOLS

Acknowledgement of Required Training

☐ * I understand that I must complete all training required for account set up and forward a copy of the training certificate to the Agency/Organization Program Coordinator. I also understand that this request will be held in pending status by the Agency/Organization Program Coordinator until my training certificates are received. (Click **here** for more information.)

If you have completed the required training or want to update the training completion date, enter the date here:

Role	Name	Training Completion Date
Primary Approving/Billing Official:	User Name	*(YYYYMMDD e.g.: 20070131)*
Alternate Approving/Billing Official:	User Name	20101230
Alternate Approving/Billing Official:	User Name	20110416
Alternate Approving/Billing Official:	User Name	20110808

Rejection Feedback

If you are rejecting this request, provide a reason for rejection and click Reject. If rejected, any changes that you made will not be saved.

Reason Code:

Comments

If you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in workflow.

Comments:

Clicking Submit indicates that you have entered all necessary information for the Managing Account request and would like to begin processing the request.

Clicking Reject indicates that there are issues with the request that must be detailed in the Rejection Feedback section above. Rejections will be returned to your Approving/Billing Official Supervisor.

king Save as Draft returns this task to your task list for future processing.

sion: 2.4.004

USB: PROD

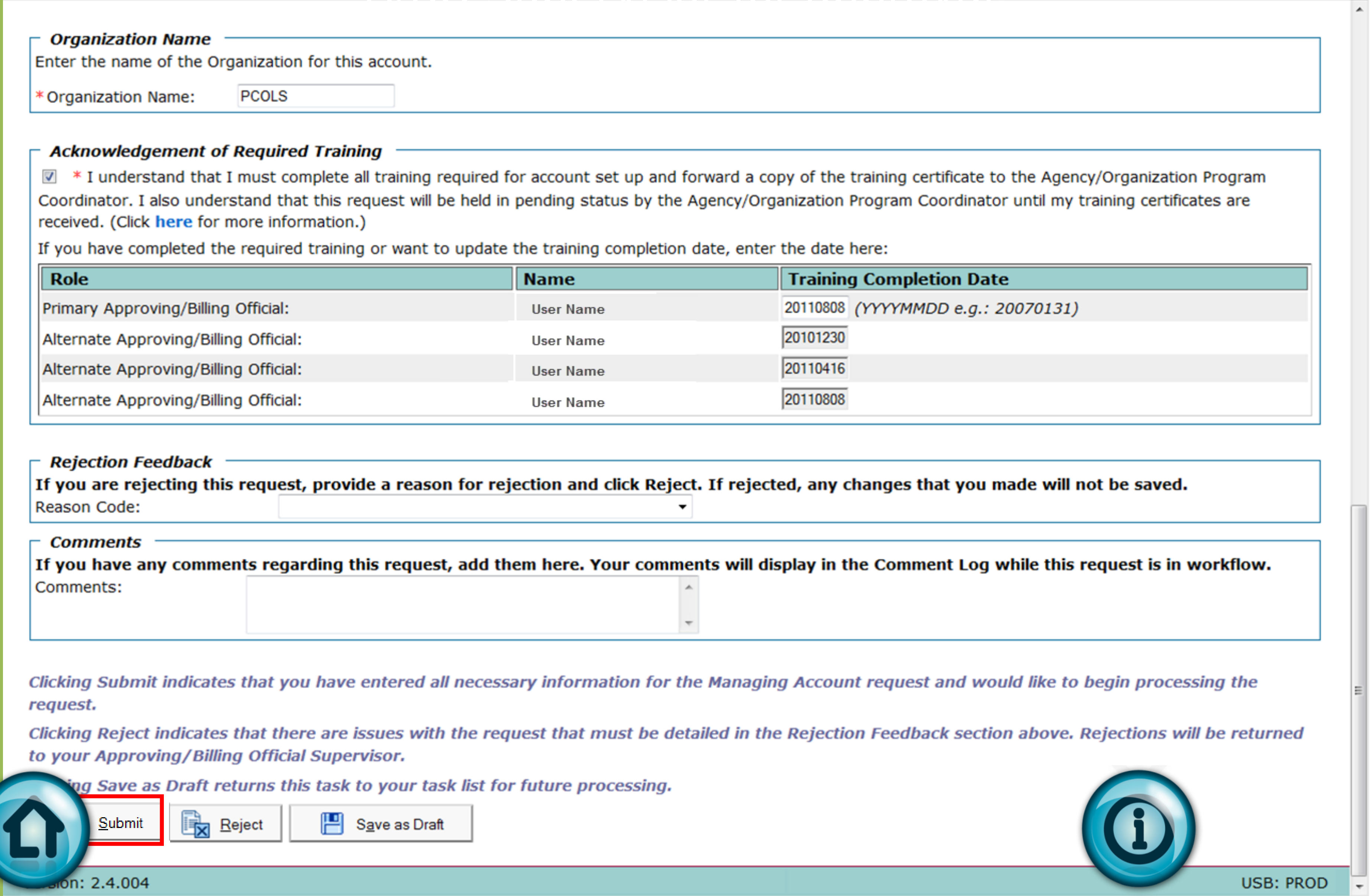
When the A/BO’s required training has expired, updated training is needed, and proof needs to be provided to A/OPC as soon as possible. Refresher training is available through Defense Acquisition University (DAU) course CLG 004. http://icatalog.dau.mil/onlinecatalog/courses.aspx?crs_id=412

The initial A/BO training is course CLG 001.

http://icatalog.dau.mil/onlinecatalog/courses.aspx?crs_id=241

The Acknowledgements of Required Training and the Training Completion Date has been entered by the A/BO. Click the “Submit” button to send the new managing account to the A/BO Supervisor for approval

A/BO Action 1 AIM: Complete Set-up Request for New MA



Organization Name

Enter the name of the Organization for this account.

* Organization Name: PCOLS

Acknowledgement of Required Training

☑ * I understand that I must complete all training required for account set up and forward a copy of the training certificate to the Agency/Organization Program Coordinator. I also understand that this request will be held in pending status by the Agency/Organization Program Coordinator until my training certificates are received. (Click here for more information.)

If you have completed the required training or want to update the training completion date, enter the date here:

Role	Name	Training Completion Date
Primary Approving/Billing Official:	User Name	20110808 *(YYYYMMDD e.g.: 20070131)*
Alternate Approving/Billing Official:	User Name	20101230
Alternate Approving/Billing Official:	User Name	20110416
Alternate Approving/Billing Official:	User Name	20110808

Rejection Feedback

If you are rejecting this request, provide a reason for rejection and click Reject. If rejected, any changes that you made will not be saved.

Reason Code:

Comments

If you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in workflow.

Comments:

Clicking Submit indicates that you have entered all necessary information for the Managing Account request and would like to begin processing the request.

Clicking Reject indicates that there are issues with the request that must be detailed in the Rejection Feedback section above. Rejections will be returned to your Approving/Billing Official Supervisor.

ing Save as Draft returns this task to your task list for future processing.

Note: If you choose to reject the Managing Account, you must choose a **Reason Code** from the drop-down box. If you have any additional comments, you can enter them in the text box. Click **Reject**.

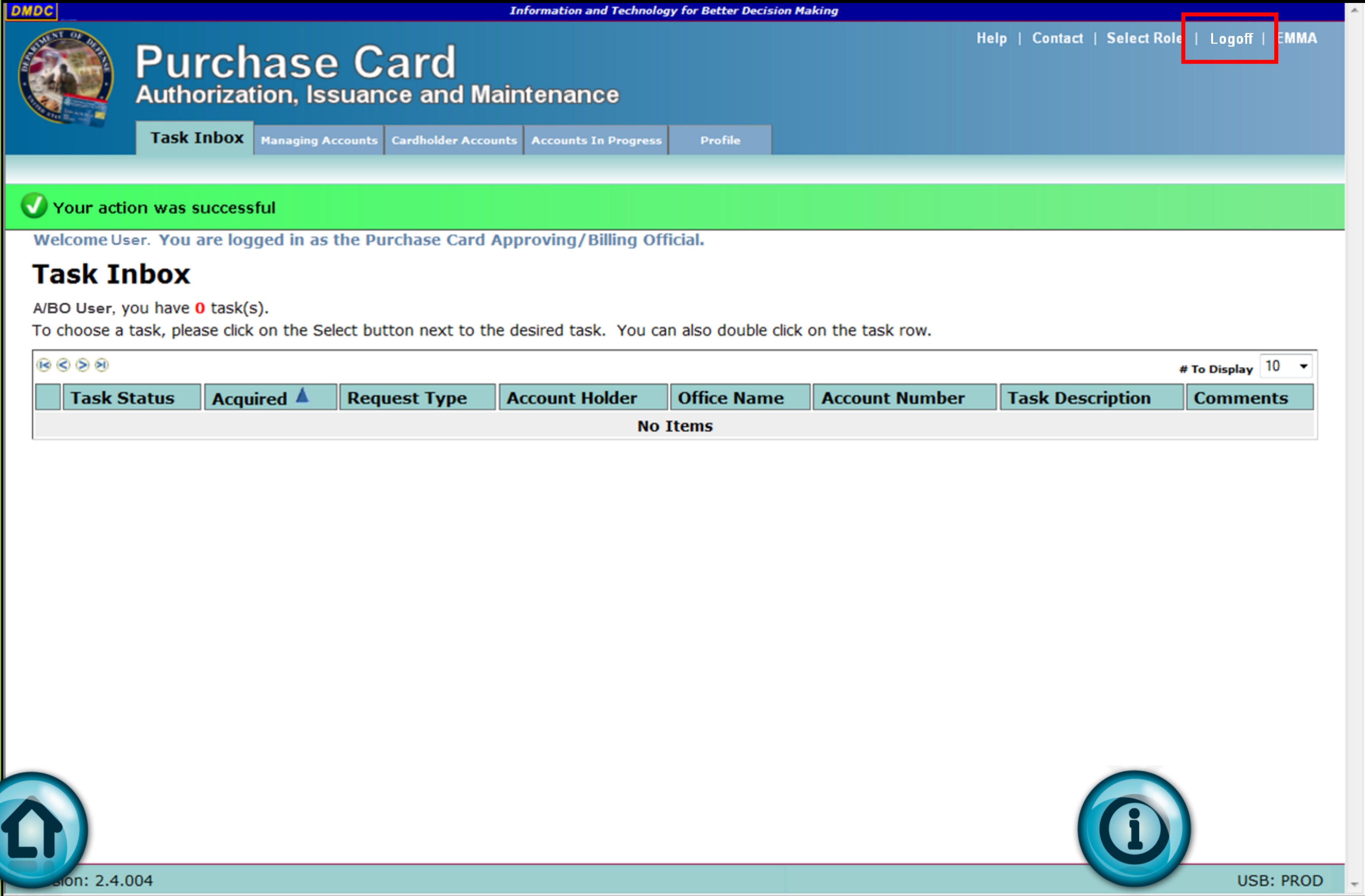
You have the option to **Save as Draft** and return to finish entering information.

You also have the option to **Assign to Pool**, if you would like other members of the RM Pool to have access to this Managing Account. Assigning the account to the RM Pool will allow other members of the pool to act, not only on the Managing Account, but all Cardholder Accounts created beneath it.

Tip: To check the status of an account request, click the **Accounts in Progress** tab.

A/BO Action 1 AIM: Accept Nomination as A/BO on MA

The action was successful. Click the “Logoff” link.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

✓ Your action was successful

Welcome User. You are logged in as the Purchase Card Approving/Billing Official.

Task Inbox

A/BO User, you have 0 task(s).

To choose a task, please click on the Select button next to the desired task. You can also double click on the task row.

To Display 10

	Task Status	Acquired	Request Type	Account Holder	Office Name	Account Number	Task Description	Comments
				No Items				

sion: 2.4.004

USB: PROD

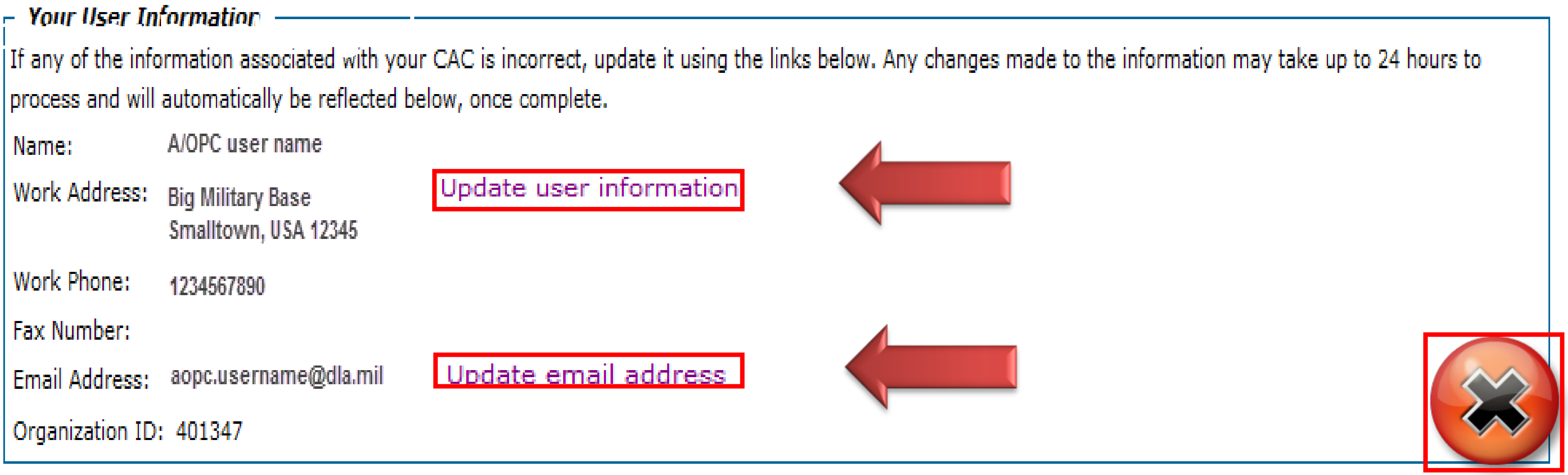
WARNING: A/BOs are required to have a work address to process accounts.

Click on the “Profile” tab in AIM see what information is displayed. If you need to add or update your work address and phone number information, click the “Update” link next to the corresponding field and you will be directed to milConnect to make the update.

NOTE: If you are both a sponsor and a dependent, you must be logged in as the sponsor to make the updates.

If you need to add or update your email address, click the “Update” link net to the corresponding field and you will be directed to RAPIDS Self Service to update.

The **User Information** text box also displays your **Organization ID**. This ID is assigned according to your **Organization** in EMMA and



Your User Information

If any of the information associated with your CAC is incorrect, update it using the links below. Any changes made to the information may take up to 24 hours to process and will automatically be reflected below, once complete.

Name: A/OPC user name

Work Address: Big Military Base
Smalltown, USA 12345

Work Phone: 1234567890

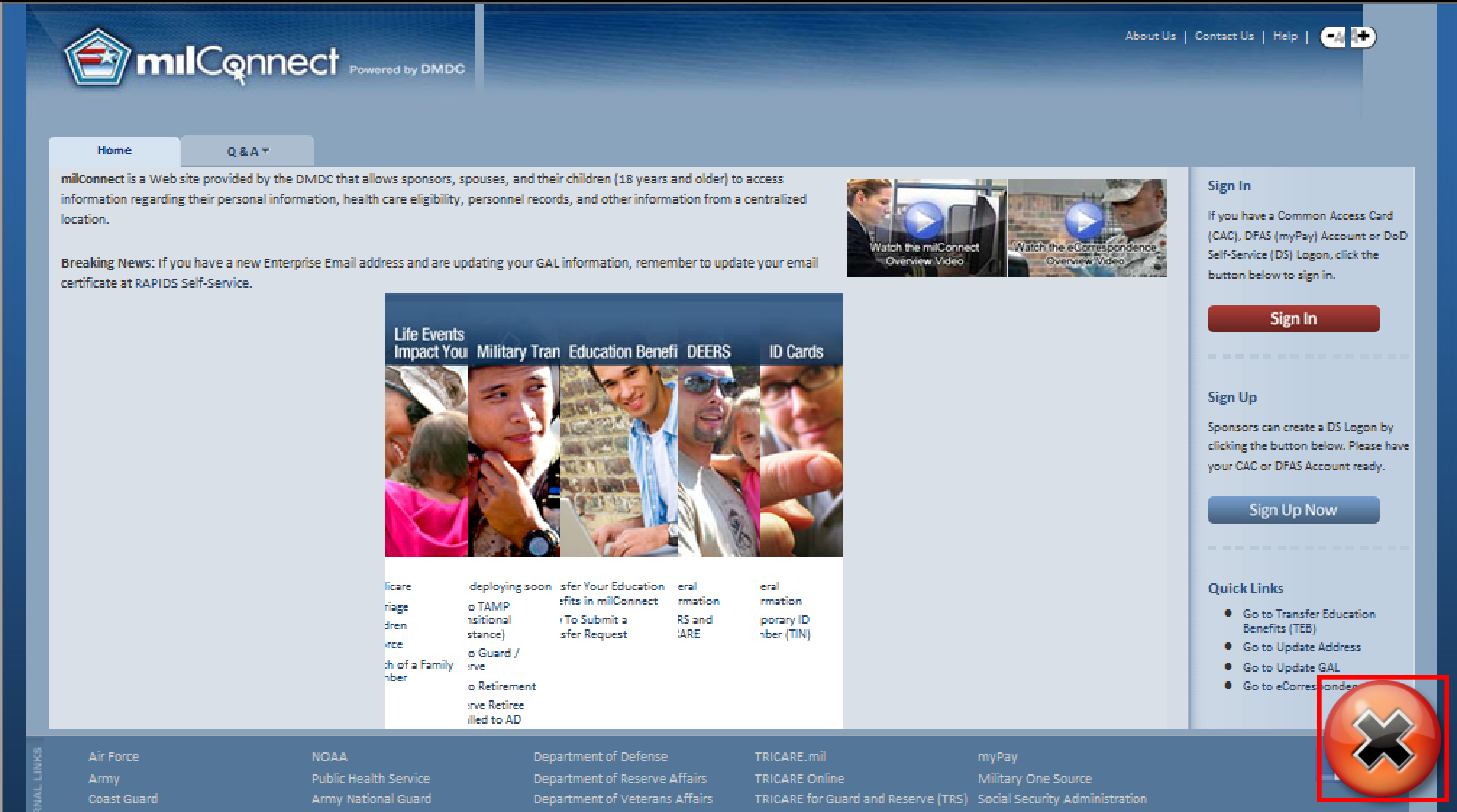
Fax Number:

Email Address: aopc.username@dla.mil

Organization ID: 401347

milConnect

http://www.dmdc.osd.mil/milconnect


milConnect Powered by DMDC
About Us | Contact Us | Help |
Home
Q & A
Watch the milConnect Overview Video
Watch the eCorrespondence Overview Video
Life Events Impact You
Military Tran
Education Benefi
DEERS
ID Cards
Sign In
Sign Up Now
RNAL LINKS

milConnect is a Web site provided by the DMDC that allows sponsors, spouses, and their children (18 years and older) to access information regarding their personal information, health care eligibility, personnel records, and other information from a centralized location.

Breaking News: If you have a new Enterprise Email address and are updating your GAL information, remember to update your email certificate at RAPIDS Self-Service.

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nber

deploying soon
o TAMP
nsitional
stance)
o Guard /
rve
o Retirement
rve Retiree
lled to AD

sfer Your Education
efits in milConnect
To Submit a
sfer Request

eral
rmation
RS and
ARE

eral
rmation
porary ID
nber (TIN)

Sign In

If you have a Common Access Card (CAC), DFAS (myPay) Account or DoD Self-Service (DS) Logon, click the button below to sign in.

Sign Up

Sponsors can create a DS Logon by clicking the button below. Please have your CAC or DFAS Account ready.

Quick Links

- Go to Transfer Education Benefits (TEB)
- Go to Update Address
- Go to Update GAL
- Go to eCorrespondence

Air Force
Army
Coast Guard

NOAA
Public Health Service
Army National Guard

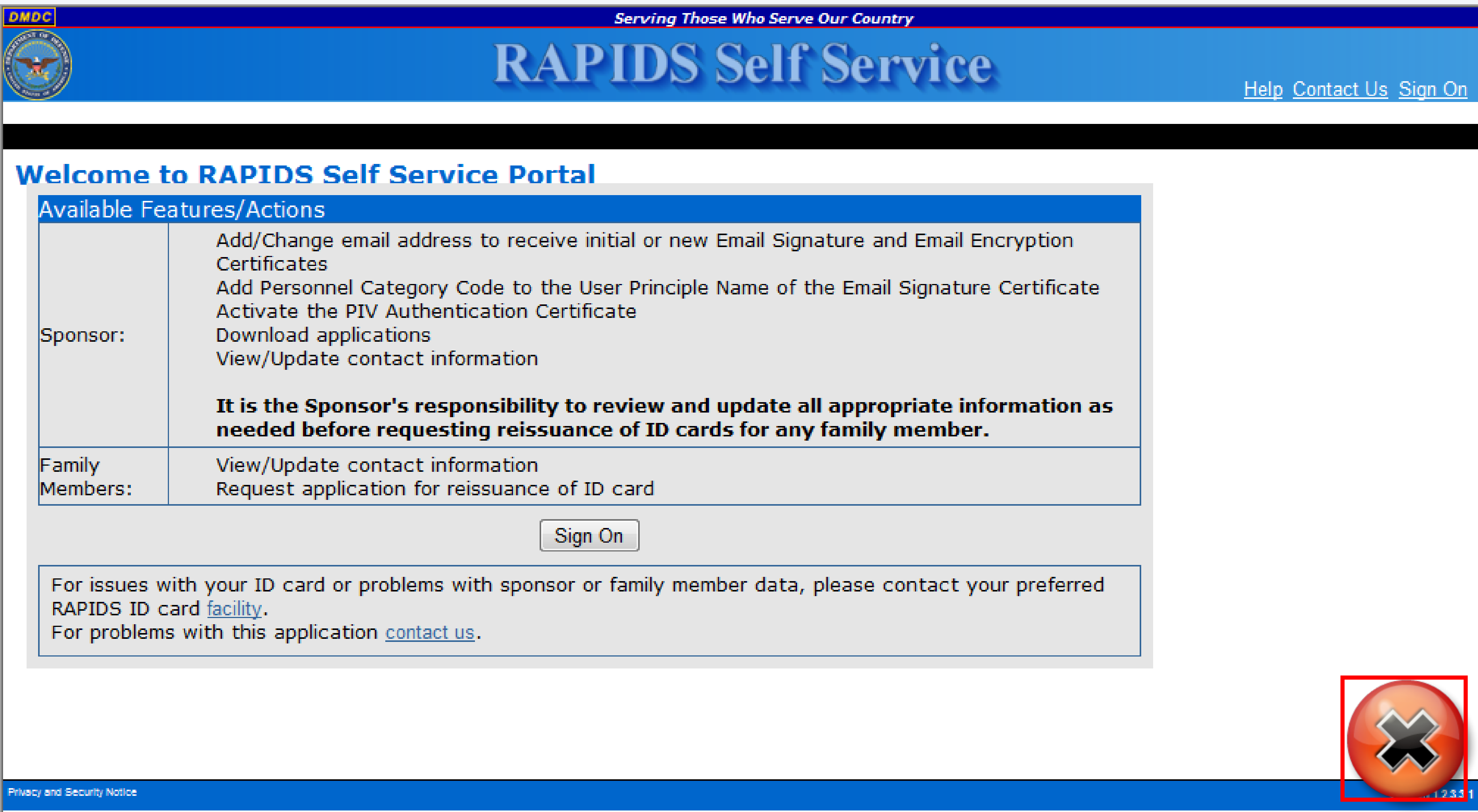
Department of Defense
Department of Reserve Affairs
Department of Veterans Affairs

TRICARE.mil
TRICARE Online
TRICARE for Guard and Reserve (TRS)

myPay
Military One Source
Social Security Administration

RAPIDS Self Service

http://www.dmdc.osd.mil/self_service/


DMDC
Serving Those Who Serve Our Country
RAPIDS Self Service
Help Contact Us Sign On

Welcome to RAPIDS Self Service Portal

Available Features/Actions	
Sponsor:	Add/Change email address to receive initial or new Email Signature and Email Encryption Certificates Add Personnel Category Code to the User Principle Name of the Email Signature Certificate Activate the PIV Authentication Certificate Download applications View/Update contact information **It is the Sponsor's responsibility to review and update all appropriate information as needed before requesting reissuance of ID cards for any family member.**
Family Members:	View/Update contact information Request application for reissuance of ID card

For issues with your ID card or problems with sponsor or family member data, please contact your preferred RAPIDS ID card facility.
For problems with this application contact us.

Privacy and Security Notice

A/BO Action 1

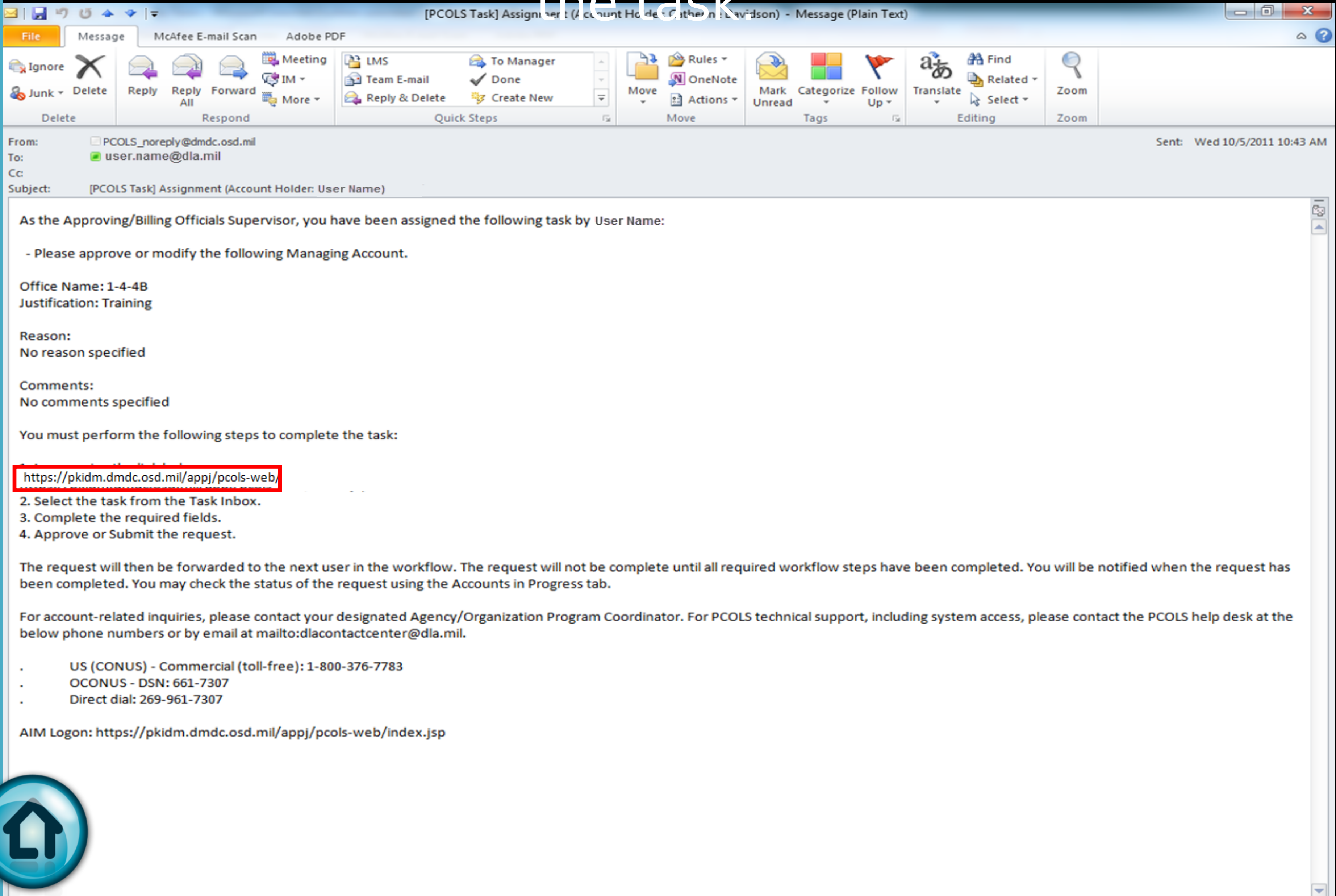
Complete

A/BO Supervisor Action 1

AIM: Approve Managing Account

The A/BO Supervisor has received a PCOLS Task email to “approve or modify the following Managing Account.” Click on the link to complete the task.

A/BO Supervisor Action 1 AIM: Approve Managing Account


[PCOLS Task] Assignment (Account Holder: Catherine Davidson) - Message (Plain Text)
File
Message
McAfee E-mail Scan
Adobe PDF
Ignore
Junk
Delete
Delete
Reply
Reply All
Forward
Meeting
IM
More
Respond
LMS
Team E-mail
Reply & Delete
To Manager
Done
Create New
Quick Steps
Move
Rules
OneNote
Actions
Move
Mark Unread
Categorize
Follow Up
Tags
Translate
Find
Related
Select
Editing
Zoom
Zoom

From: PCOLS_noreply@dmdc.osd.mil
To: user.name@dla.mil
Cc:
Subject: [PCOLS Task] Assignment (Account Holder: User Name)
Sent: Wed 10/5/2011 10:43 AM

As the Approving/Billing Officials Supervisor, you have been assigned the following task by User Name:

- Please approve or modify the following Managing Account.

Office Name: 1-4-4B
Justification: Training

Reason:
No reason specified

Comments:
No comments specified

You must perform the following steps to complete the task:

https://pkidm.dmdc.osd.mil/appj/pcols-web/
2. Select the task from the Task Inbox.
3. Complete the required fields.
4. Approve or Submit the request.

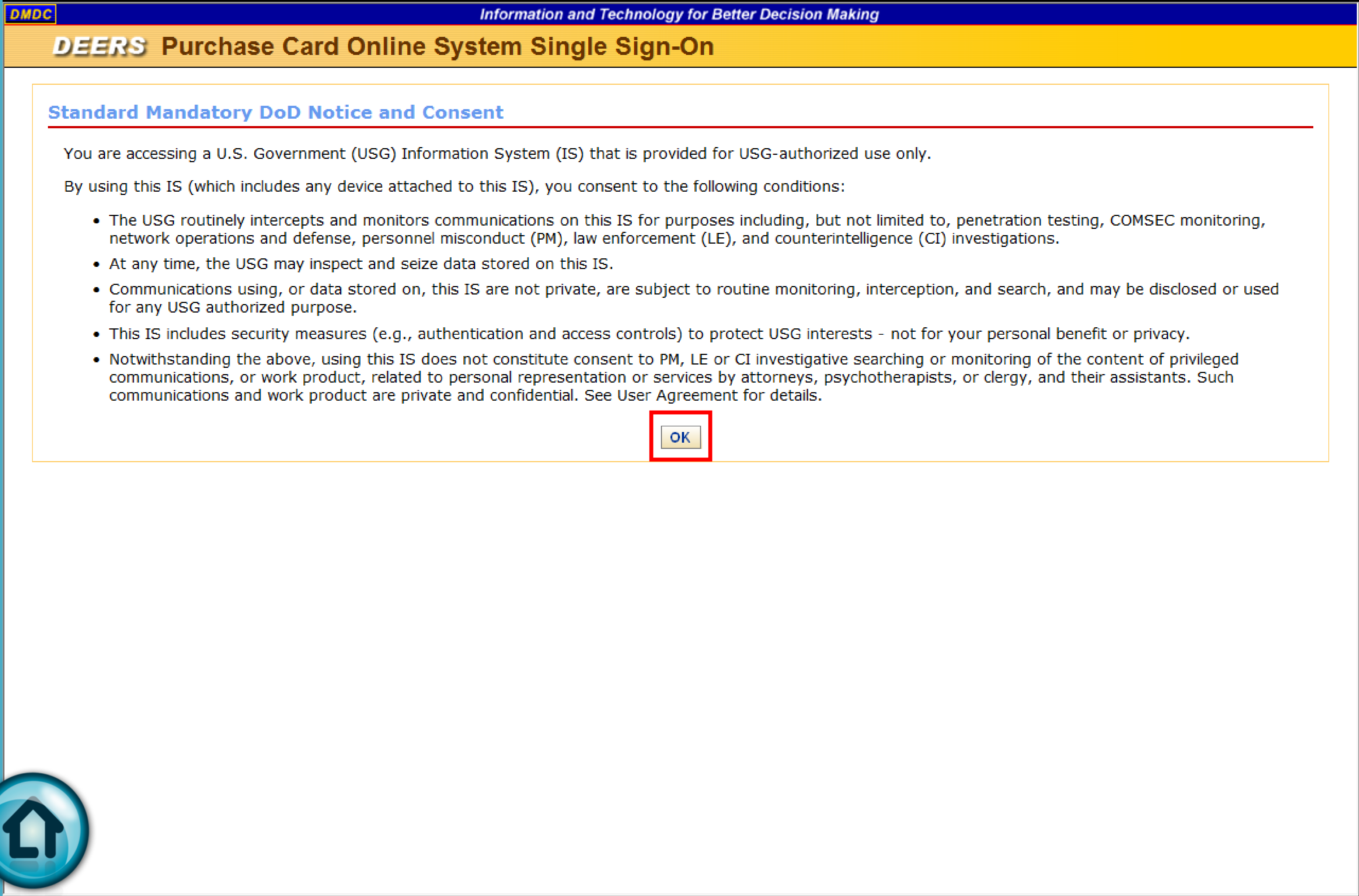
The request will then be forwarded to the next user in the workflow. The request will not be complete until all required workflow steps have been completed. You will be notified when the request has been completed. You may check the status of the request using the Accounts in Progress tab.

For account-related inquiries, please contact your designated Agency/Organization Program Coordinator. For PCOLS technical support, including system access, please contact the PCOLS help desk at the below phone numbers or by email at mailto:dlacontactcenter@dla.mil.

. US (CONUS) - Commercial (toll-free): 1-800-376-7783
. OCONUS - DSN: 661-7307
. Direct dial: 269-961-7307

AIM Logon: https://pkidm.dmdc.osd.mil/appj/pcols-web/index.jsp

Click the “Ok” button.


DMDC
Information and Technology for Better Decision Making
DEERS Purchase Card Online System Single Sign-On

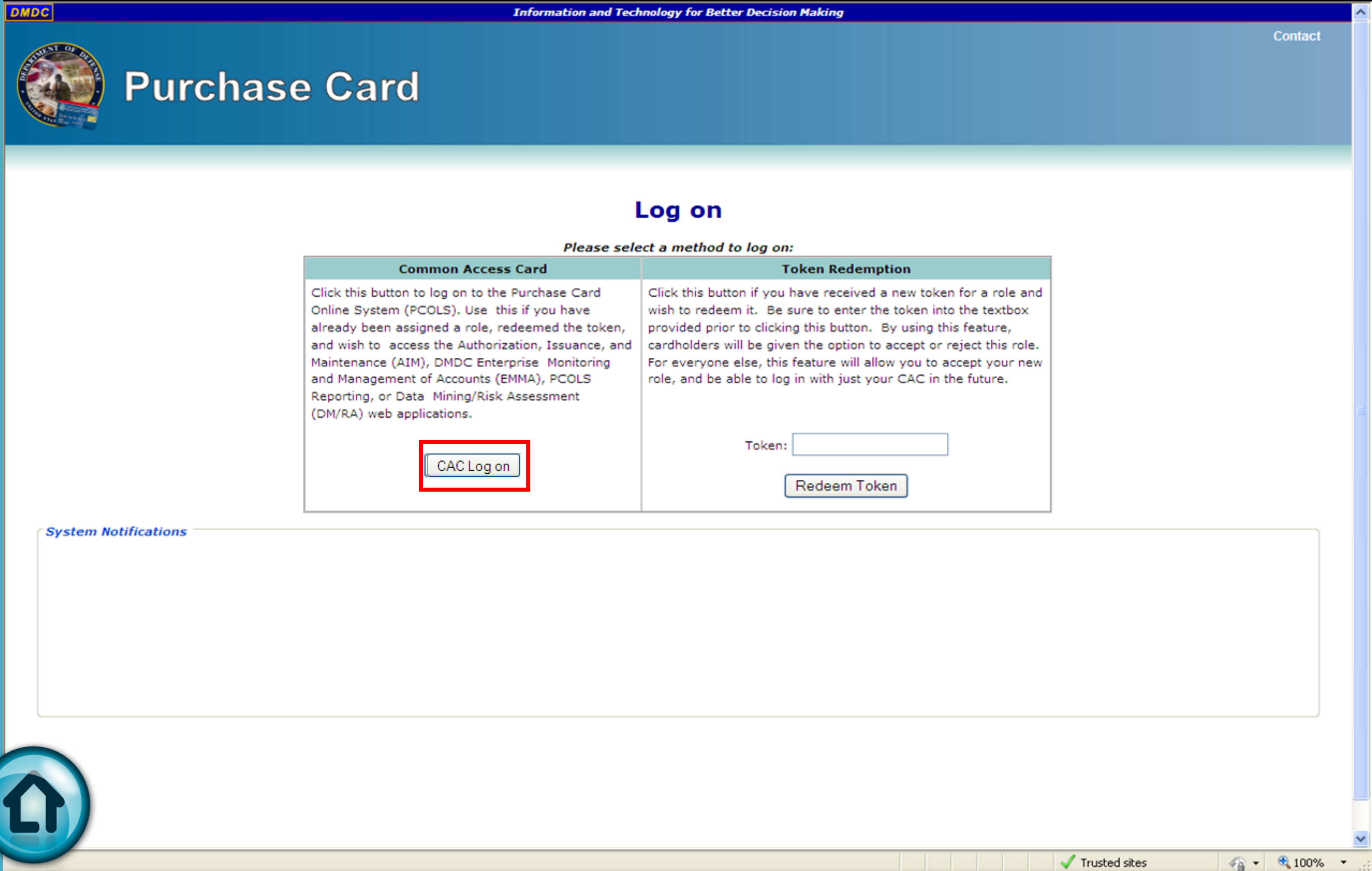
Standard Mandatory DoD Notice and Consent

You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only.

By using this IS (which includes any device attached to this IS), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests - not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential. See User Agreement for details.

Click the “CAC Log on” button.



Purchase Card

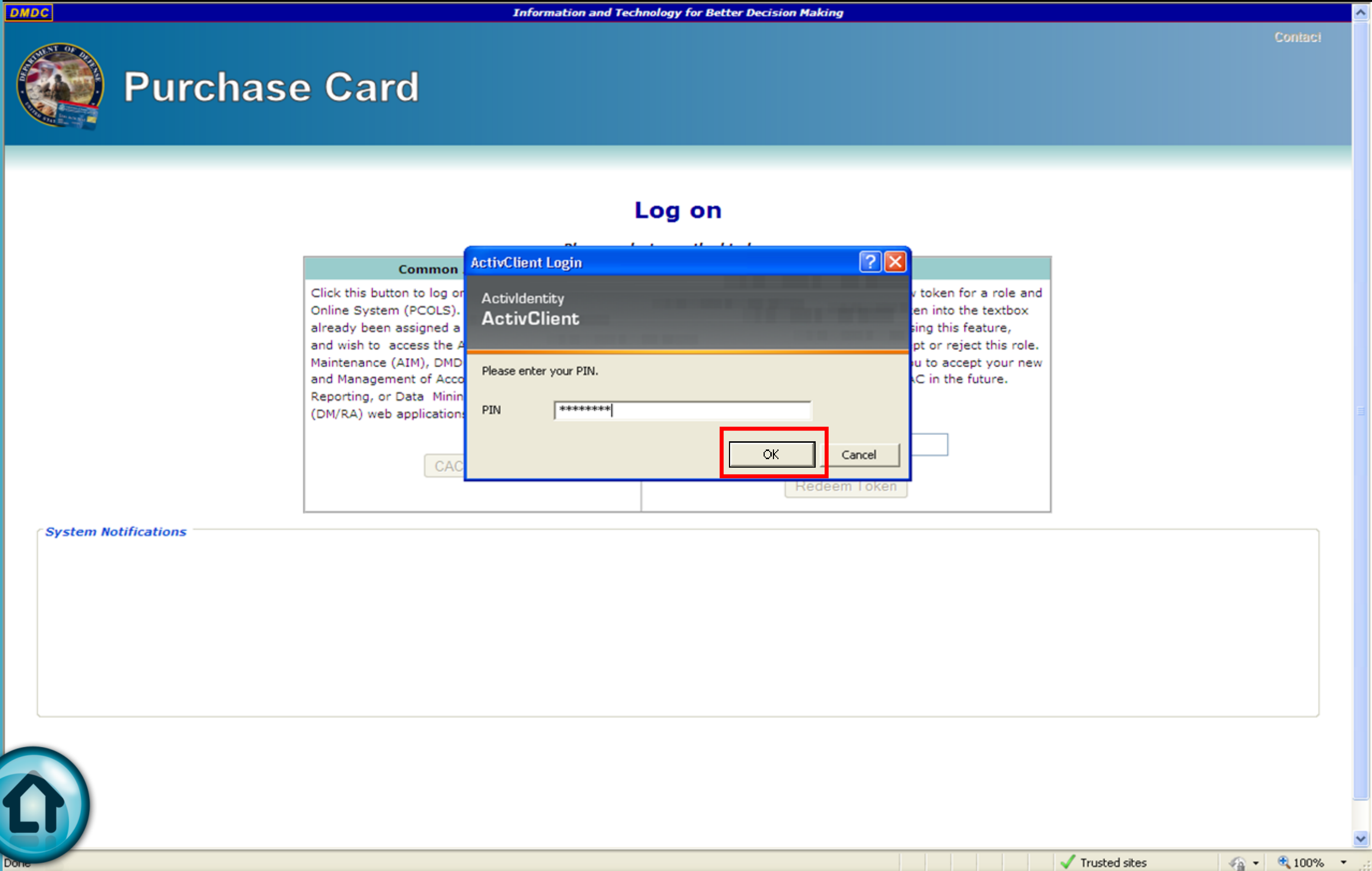
Log on

Please select a method to log on:

Common Access Card	Token Redemption
Click this button to log on to the Purchase Card Online System (PCOLS). Use this if you have already been assigned a role, redeemed the token, and wish to access the Authorization, Issuance, and Maintenance (AIM), DMDC Enterprise Monitoring and Management of Accounts (EMMA), PCOLS Reporting, or Data Mining/Risk Assessment (DM/RA) web applications.	Click this button if you have received a new token for a role and wish to redeem it. Be sure to enter the token into the textbox provided prior to clicking this button. By using this feature, cardholders will be given the option to accept or reject this role. For everyone else, this feature will allow you to accept your new role, and be able to log in with just your CAC in the future.
CAC Log on	Token: Redeem Token

System Notifications

The A/BO Supervisor has entered their PIN. Click the “OK” button.


DMDC
Information and Technology for Better Decision Making
Contact
Purchase Card
Common
CAC
Redeem Token
ActivClient Login
ActivIdentity
ActivClient
OK
Cancel
Done
Trusted sites
100%

Log on

Click this button to log on
Online System (PCOLS).
already been assigned a
and wish to access the A
Maintenance (AIM), DMD
and Management of Acco
Reporting, or Data Minin
(DM/RA) web application

token for a role and
en into the textbox
ing this feature,
pt or reject this role.
u to accept your new
C in the future.

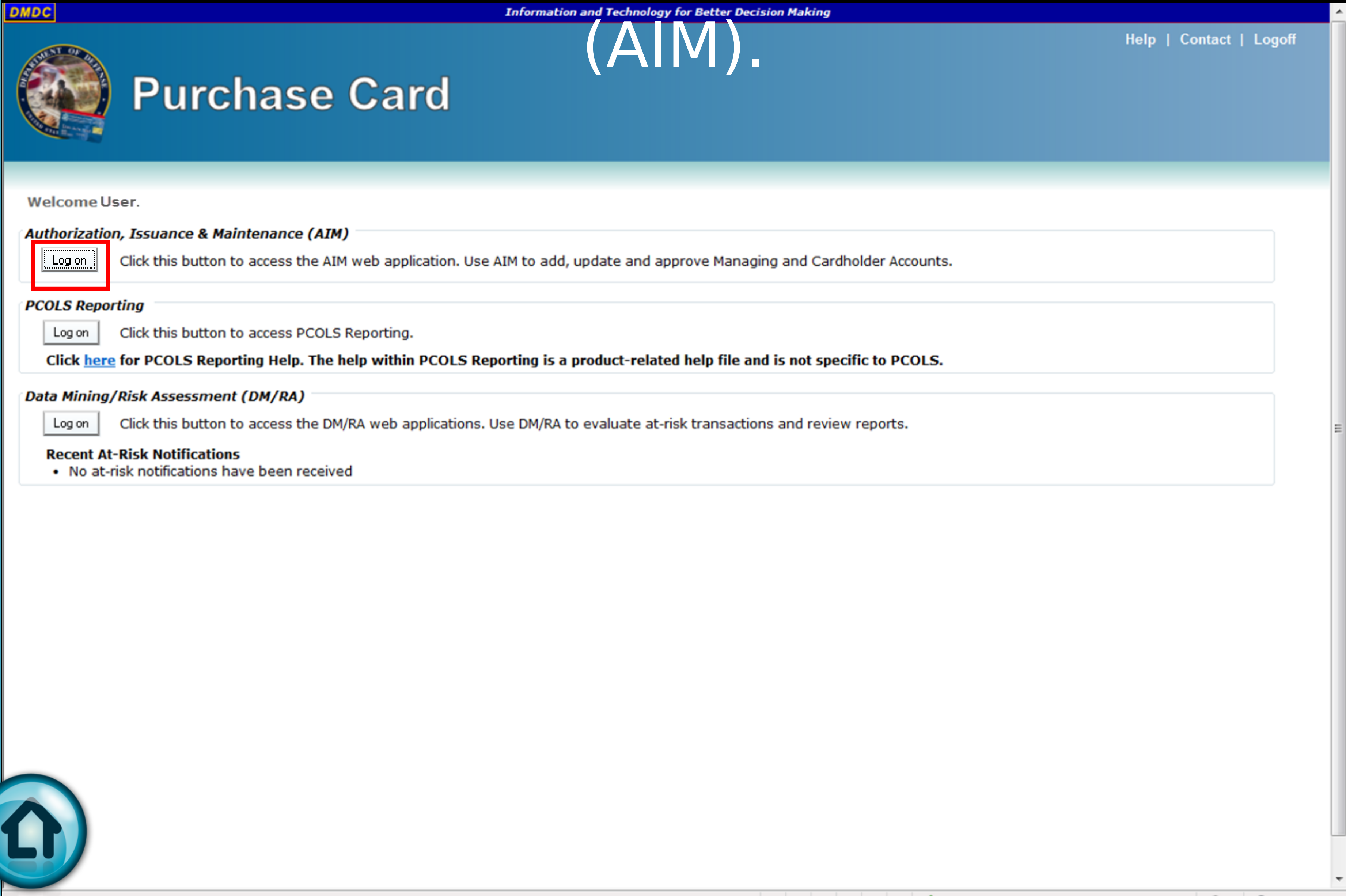
Please enter your PIN.

PIN *********

System Notifications

A/BO Supervisor Action 1 AIM: Approve Managing Account

Click on the “Log on” button for Authorization, Issuance & Maintenance (AIM).


DMDC
Information and Technology for Better Decision Making
Help | Contact | Logoff
Purchase Card
Log on
Log on
Log on

Welcome User.

Authorization, Issuance & Maintenance (AIM)

Click this button to access the AIM web application. Use AIM to add, update and approve Managing and Cardholder Accounts.

PCOLS Reporting

Click this button to access PCOLS Reporting.

Click here for PCOLS Reporting Help. The help within PCOLS Reporting is a product-related help file and is not specific to PCOLS.

Data Mining/Risk Assessment (DM/RA)

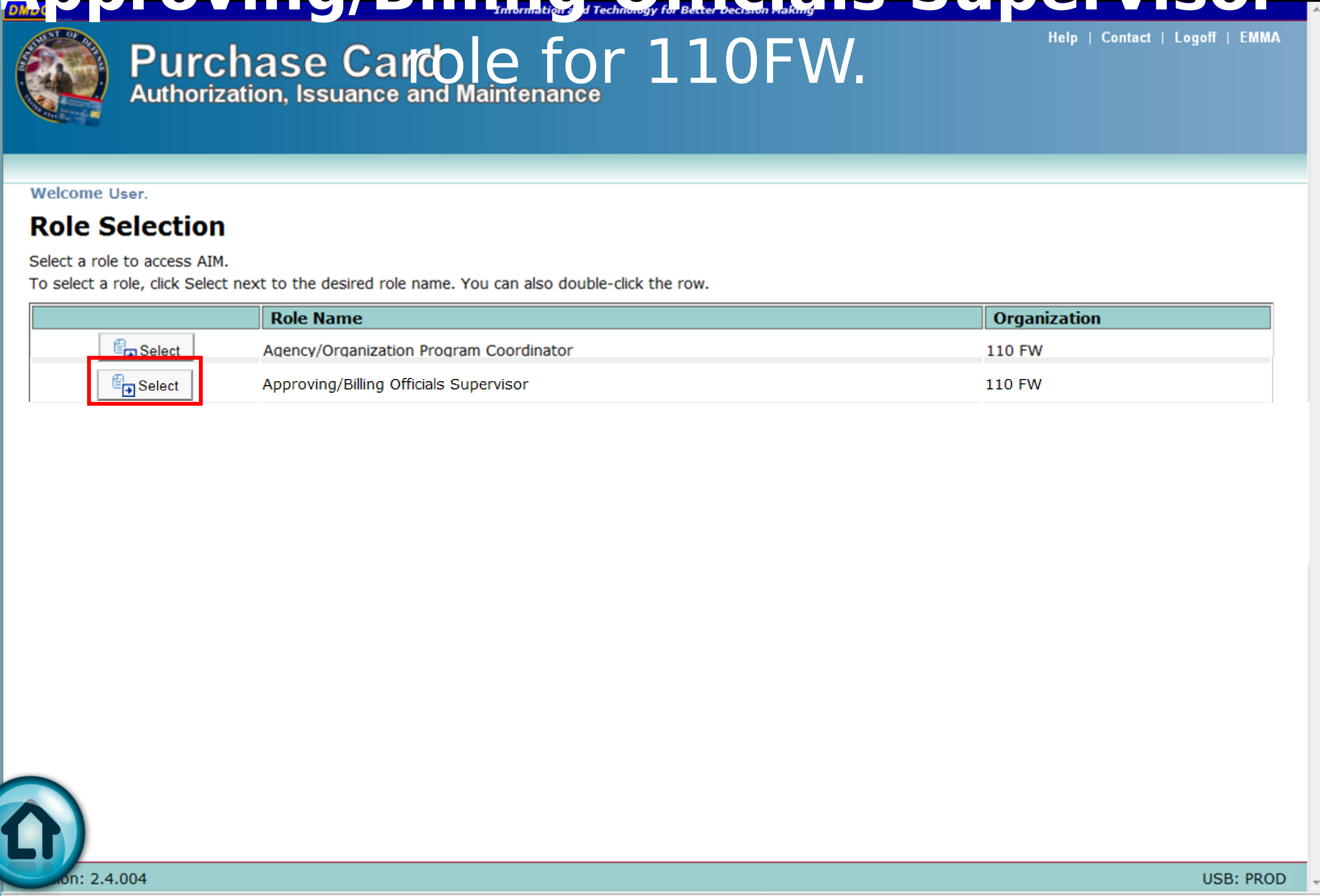
Click this button to access the DM/RA web applications. Use DM/RA to evaluate at-risk transactions and review reports.

Recent At-Risk Notifications

- No at-risk notifications have been received

A/BO Supervisor Action 1 AIM: Approve Managing Account

Click the “Select” button for the **Approving/Billing Officials Supervisor** role for 110FW.


DMDC
Information and Technology for Better Decision Making
Purchase Card
Authorization, Issuance and Maintenance
Help | Contact | Logoff | EMMA

Welcome User.

Role Selection

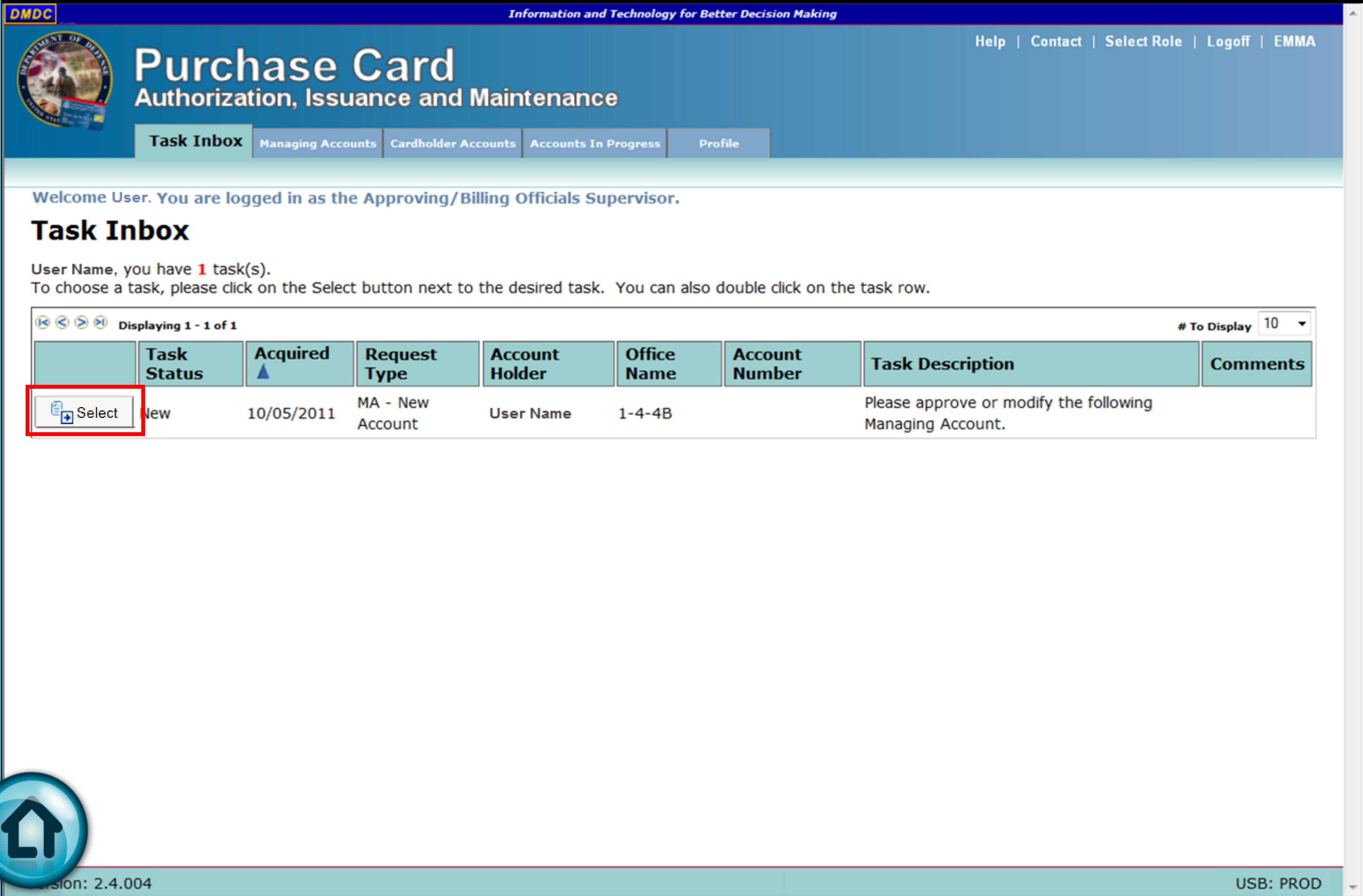
Select a role to access AIM.
To select a role, click Select next to the desired role name. You can also double-click the row.

	Role Name	Organization
Select	Agency/Organization Program Coordinator	110 FW
Select	Approving/Billing Officials Supervisor	110 FW

...ion: 2.4.004
USB: PROD

A/BO Supervisor Action 1 AIM: Approve Managing Account

Click the “Select” button to view the new task.



DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

Welcome User. You are logged in as the Approving/Billing Officials Supervisor.

Task Inbox

User Name, you have 1 task(s).
To choose a task, please click on the Select button next to the desired task. You can also double click on the task row.

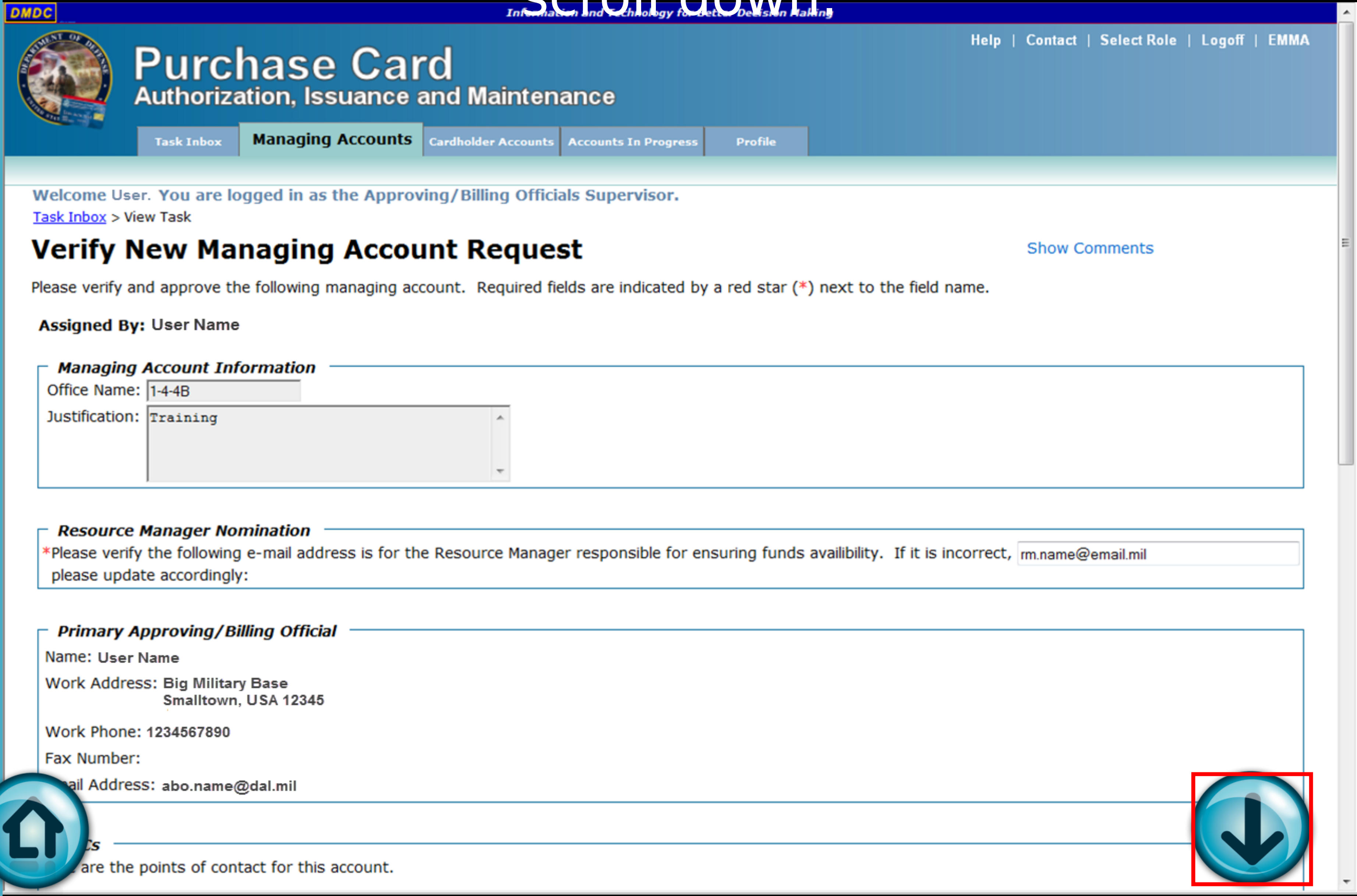
Displaying 1 - 1 of 1 | # To Display 10

	Task Status	Acquired	Request Type	Account Holder	Office Name	Account Number	Task Description	Comments
Select	New	10/05/2011	MA - New Account	User Name	1-4-4B		Please approve or modify the following Managing Account.	

Version: 2.4.004
USB: PROD

A/BO Supervisor Action 1 AIM: Approve Managing Account

The A/BO Supervisor has verified information is accurate and complete. Click on the arrow to scroll down.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

Welcome User. You are logged in as the Approving/Billing Officials Supervisor.

Task Inbox > View Task

Verify New Managing Account Request

Show Comments

Please verify and approve the following managing account. Required fields are indicated by a red star (*) next to the field name.

Assigned By: User Name

Managing Account Information

Office Name: 1-4-4B

Justification: Training

Resource Manager Nomination

*Please verify the following e-mail address is for the Resource Manager responsible for ensuring funds availibility. If it is incorrect, please update accordingly: rm.name@email.mil

Primary Approving/Billing Official

Name: User Name

Work Address: Big Military Base
Smalltown, USA 12345

Work Phone: 1234567890

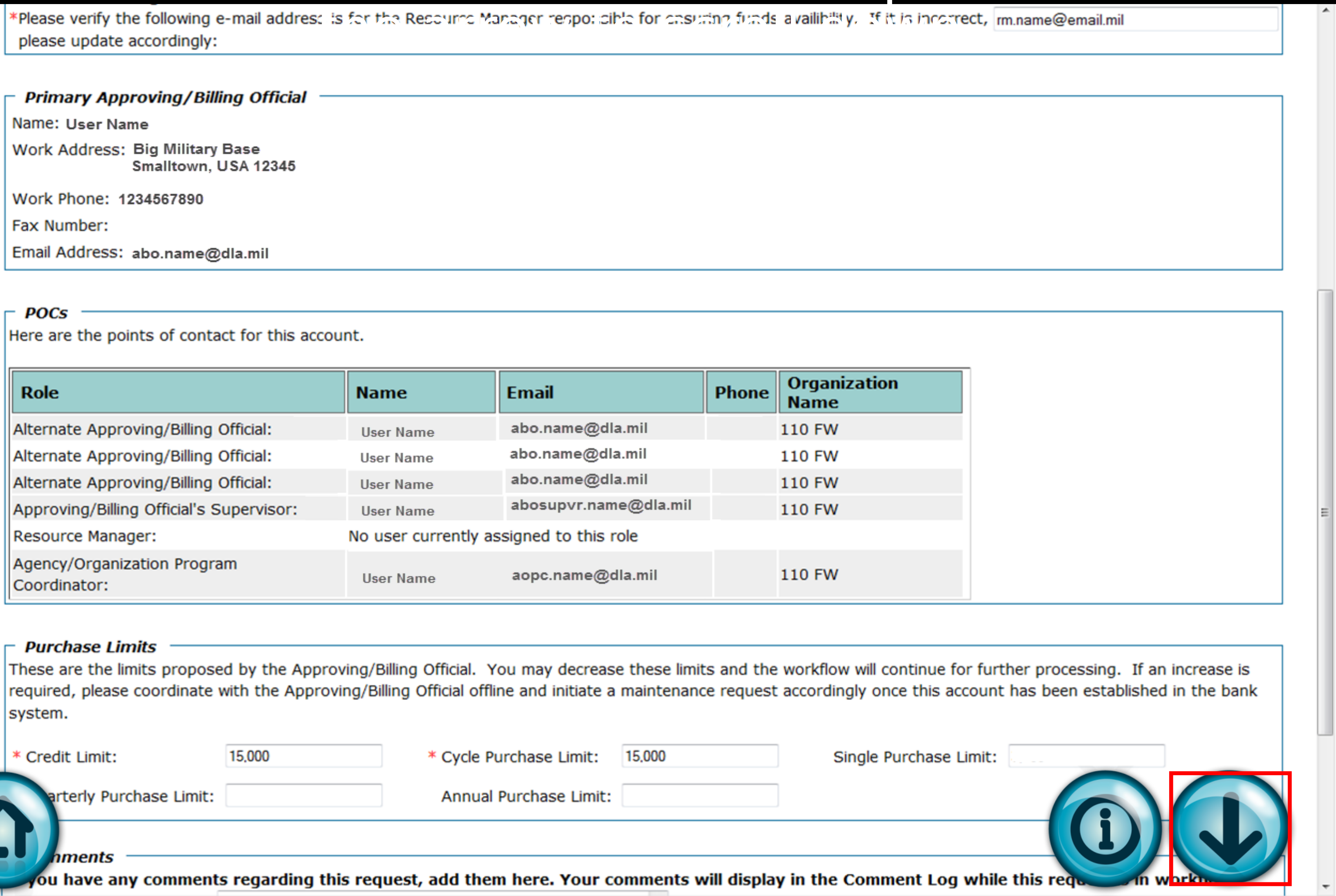
Fax Number:

ail Address: abo.name@dal.mil

Cs

are the points of contact for this account.

The A/OPC has selected the A/BOs for this account. The A/BO Supervisor has verified information is accurate and complete. Click on



*Please verify the following e-mail address is for the Resource Manager responsible for ensuring funds availability. If it is incorrect, please update accordingly: rm.name@email.mil

Primary Approving/Billing Official

Name: **User Name**

Work Address: **Big Military Base**
Smalltown, USA 12345

Work Phone: **1234567890**

Fax Number:

Email Address: **abo.name@dla.mil**

POCs

Here are the points of contact for this account.

Role	Name	Email	Phone	Organization Name
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Approving/Billing Official's Supervisor:	User Name	abosupvr.name@dla.mil		110 FW
Resource Manager:	No user currently assigned to this role			
Agency/Organization Program Coordinator:	User Name	aopc.name@dla.mil		110 FW

Purchase Limits

These are the limits proposed by the Approving/Billing Official. You may decrease these limits and the workflow will continue for further processing. If an increase is required, please coordinate with the Approving/Billing Official offline and initiate a maintenance request accordingly once this account has been established in the bank system.

* Credit Limit: 15,000

* Cycle Purchase Limit: 15,000

Single Purchase Limit:

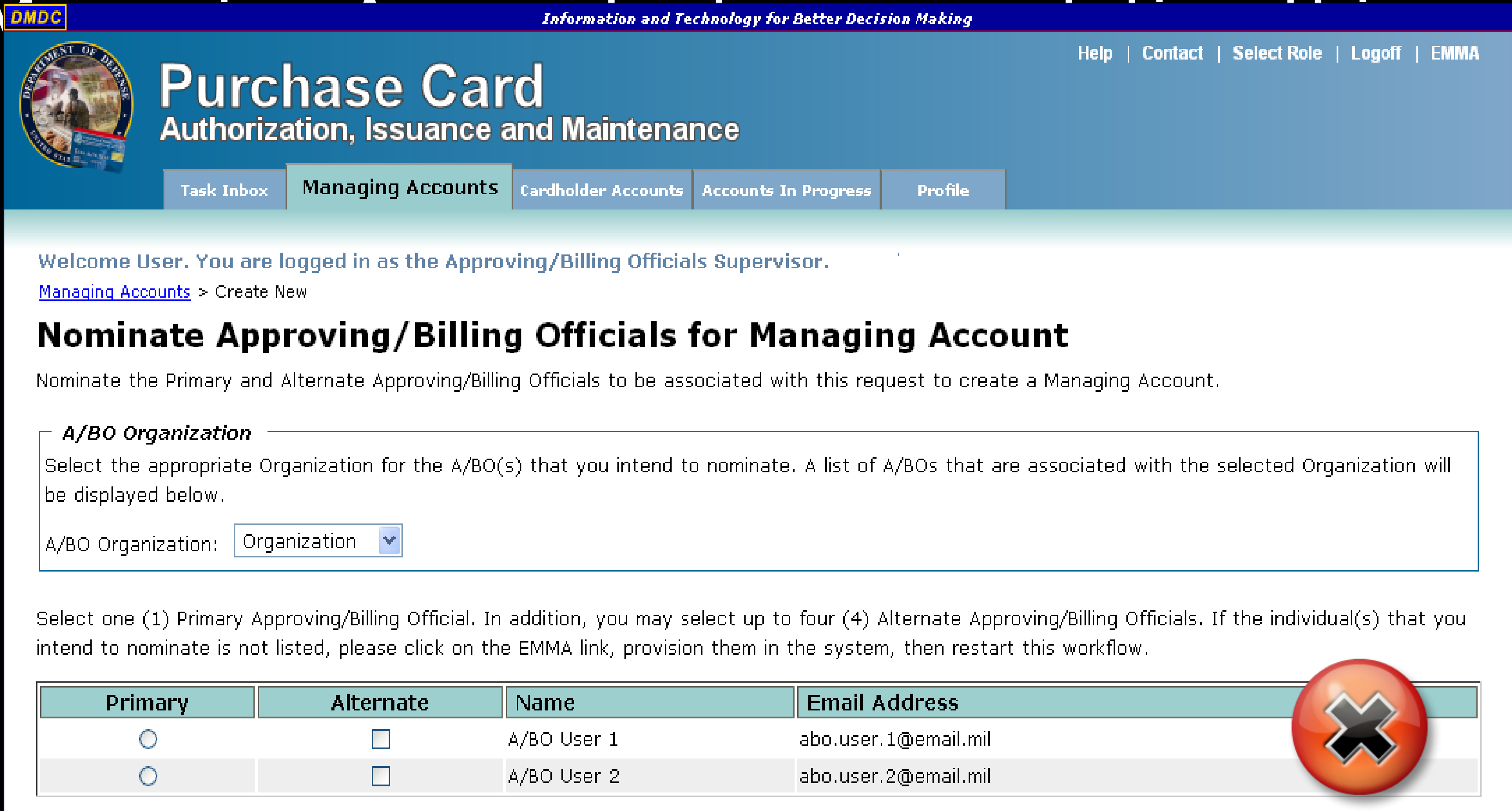
arterly Purchase Limit:

Annual Purchase Limit:

mments

you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this req in work

Note: If the A/OPC initiates the request for a Managing Account and does NOT select the A/BOs that should be assigned to the account, the A/BO Supervisor will be required to select the A/BOs for the new


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

Welcome User. You are logged in as the Approving/Billing Officials Supervisor.

Managing Accounts > Create New

Nominate Approving/Billing Officials for Managing Account

Nominate the Primary and Alternate Approving/Billing Officials to be associated with this request to create a Managing Account.

A/BO Organization

Select the appropriate Organization for the A/BO(s) that you intend to nominate. A list of A/BOs that are associated with the selected Organization will be displayed below.

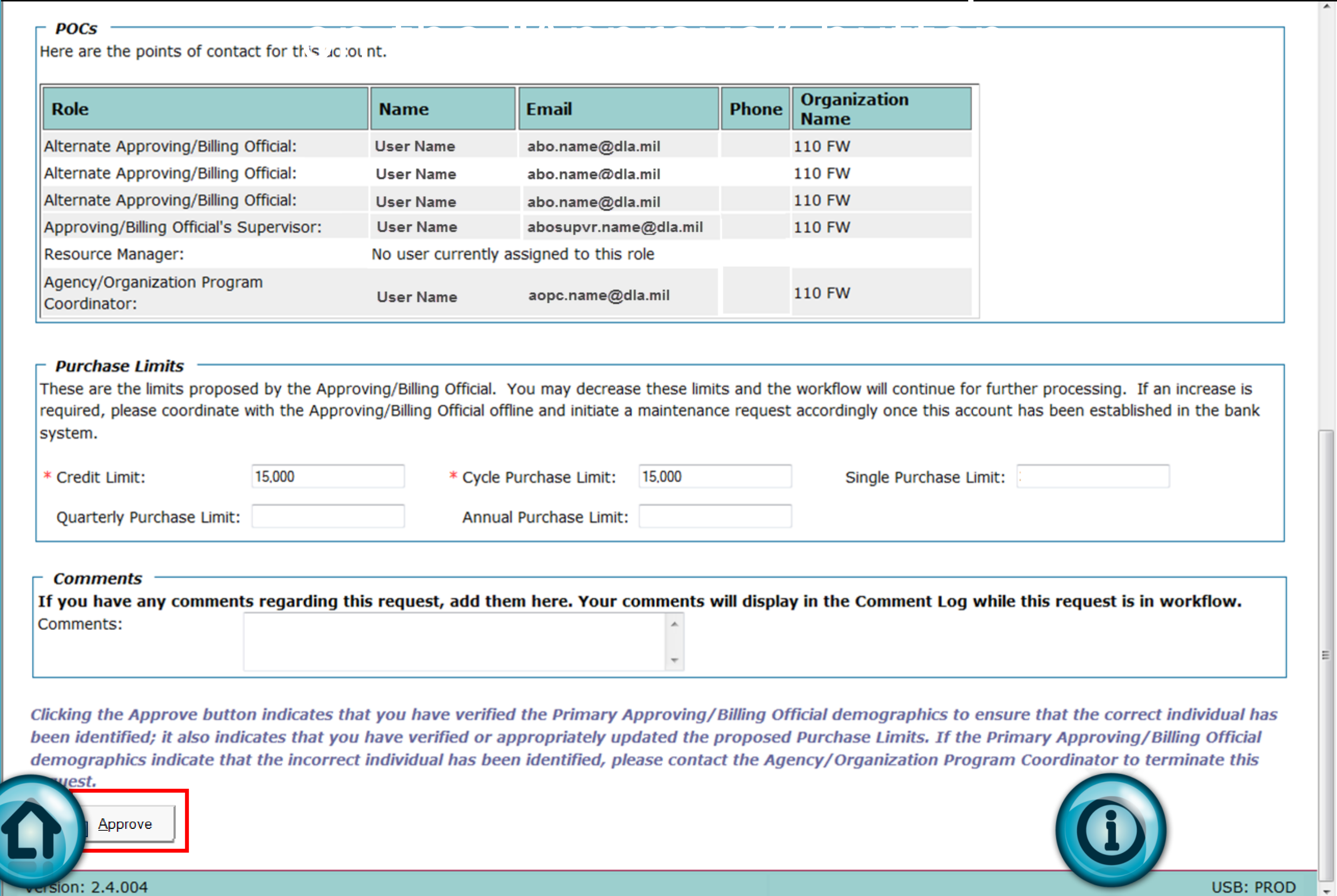
A/BO Organization: Organization

Select one (1) Primary Approving/Billing Official. In addition, you may select up to four (4) Alternate Approving/Billing Officials. If the individual(s) that you intend to nominate is not listed, please click on the EMMA link, provision them in the system, then restart this workflow.

Primary	Alternate	Name	Email Address
○	☐	A/BO User 1	abo.user.1@email.mil
○	☐	A/BO User 2	abo.user.2@email.mil

A/BO Supervisor Action 1 AIM: Approve Managing Account

The A/BO Supervisor has verified information is accurate and complete. Click



POCs

Here are the points of contact for this account.

Role	Name	Email	Phone	Organization Name
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Approving/Billing Official's Supervisor:	User Name	abosupvr.name@dla.mil		110 FW
Resource Manager:	No user currently assigned to this role			
Agency/Organization Program Coordinator:	User Name	aopc.name@dla.mil		110 FW

Purchase Limits

These are the limits proposed by the Approving/Billing Official. You may decrease these limits and the workflow will continue for further processing. If an increase is required, please coordinate with the Approving/Billing Official offline and initiate a maintenance request accordingly once this account has been established in the bank system.

* Credit Limit: 15,000
* Cycle Purchase Limit: 15,000
Single Purchase Limit:
Quarterly Purchase Limit:
Annual Purchase Limit:

Comments

If you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in workflow.

Comments:

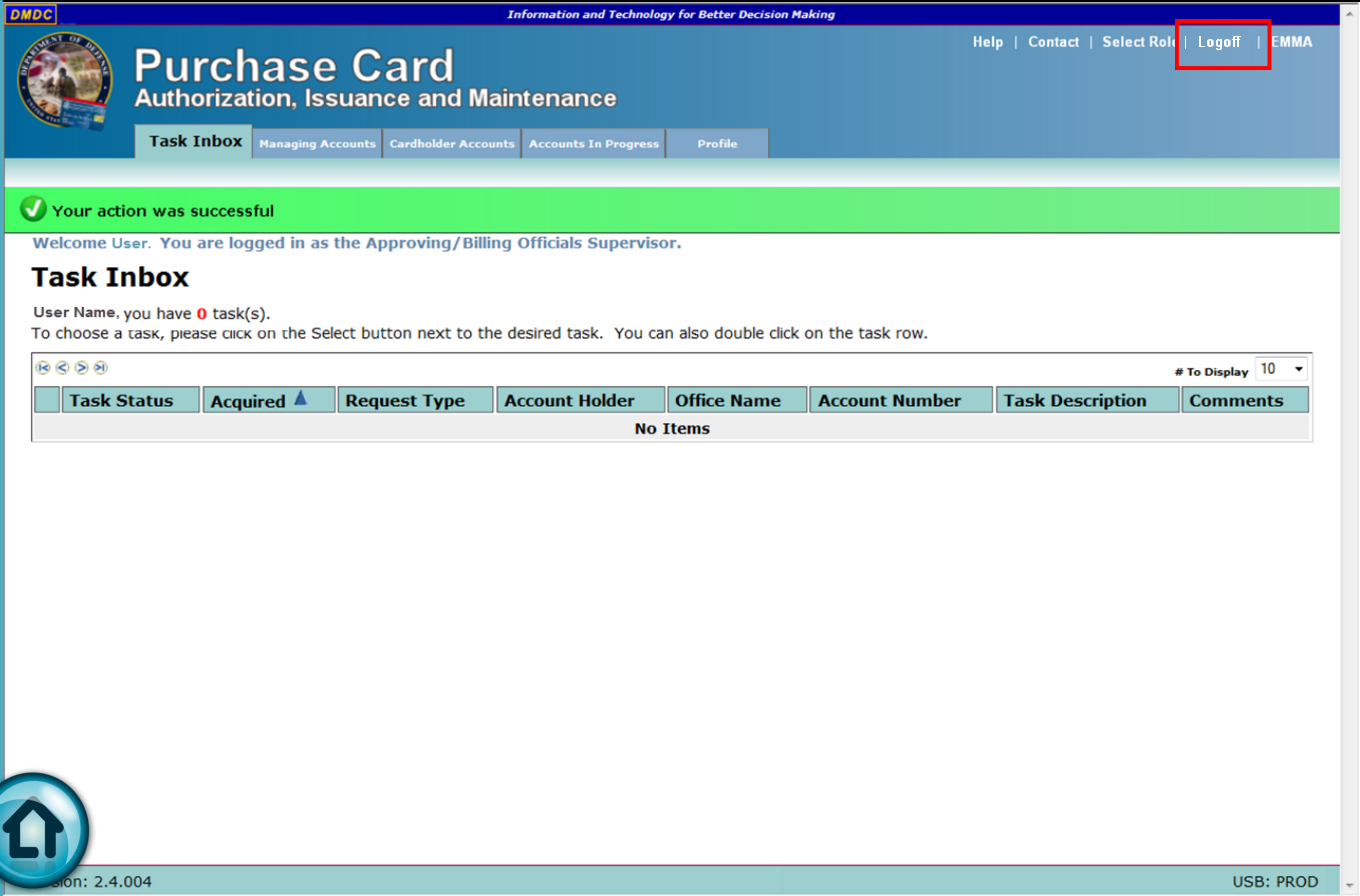
Clicking the Approve button indicates that you have verified the Primary Approving/Billing Official demographics to ensure that the correct individual has been identified; it also indicates that you have verified or appropriately updated the proposed Purchase Limits. If the Primary Approving/Billing Official demographics indicate that the incorrect individual has been identified, please contact the Agency/Organization Program Coordinator to terminate this uest.

From the **Verify New Managing Account Request** page, users have the option to decrease the requested Purchase Limits.

Note: If you decrease the Purchase Limit(s), emails will be sent to everyone currently associated with the Managing Account and the workflow will continue. If the Purchase Limits need to be increased, the A/OPC must terminate the workflow and it will need to be restarted.

A/BO Supervisor Action 1 AIM: Approve Managing Account

The action was successful. Click the “Logoff” link.



DMDC

Information and Technology for Better Decision Making

Help | Contact | Select Role | Logoff | EMMA

Purchase Card

Authorization, Issuance and Maintenance

Task Inbox | Managing Accounts | Cardholder Accounts | Accounts In Progress | Profile

✓ Your action was successful

Welcome User. You are logged in as the Approving/Billing Officials Supervisor.

Task Inbox

User Name, you have **0** task(s).

To choose a task, please click on the Select button next to the desired task. You can also double click on the task row.

To Display 10

	Task Status	Acquired	Request Type	Account Holder	Office Name	Account Number	Task Description	Comments
				No Items				

sion: 2.4.004

USB: PROD

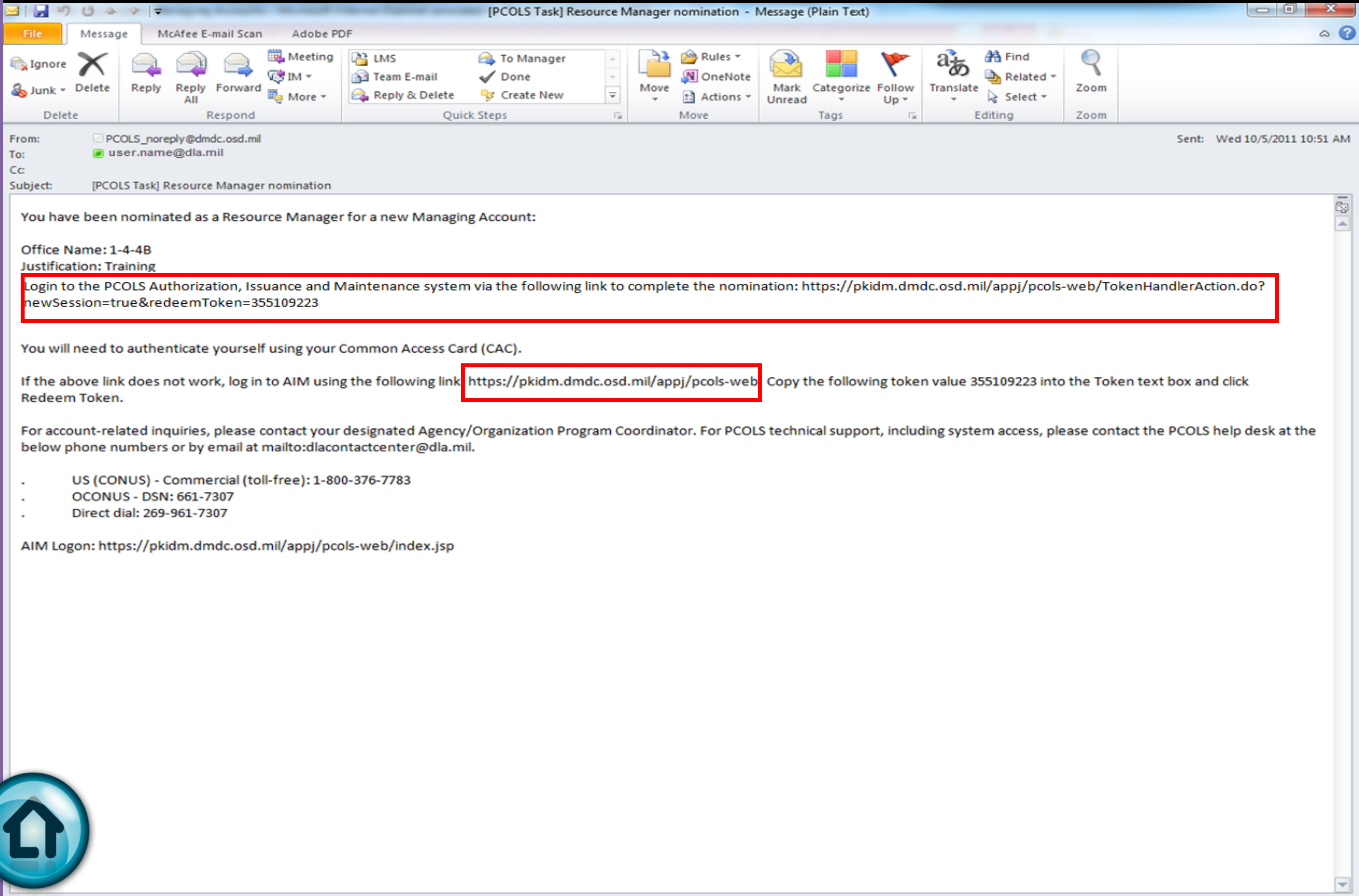
A/BO Supervisor Action 1

Complete

RM Action 1

AIM: Accept Nomination as RM on Managing Account

The RM has received a new PCOLS Task email. This task email contains a **token number** for the RM. Click one of the links to complete the task.


[PCOLS Task] Resource Manager nomination - Message (Plain Text)
File
Message
McAfee E-mail Scan
Adobe PDF
Ignore
Junk
Delete
Delete
Reply
Reply All
Forward
Meeting
IM
More
Respond
LMS
Team E-mail
Reply & Delete
To Manager
Done
Create New
Quick Steps
Move
Rules
OneNote
Actions
Move
Mark Unread
Categorize
Follow Up
Tags
Translate
Find
Related
Select
Editing
Zoom
Zoom

From: PCOLS_noreply@dmdc.osd.mil
To: user.name@dla.mil
Cc:
Subject: [PCOLS Task] Resource Manager nomination
Sent: Wed 10/5/2011 10:51 AM

You have been nominated as a Resource Manager for a new Managing Account:

Office Name: 1-4-4B
Justification: Training
Login to the PCOLS Authorization, Issuance and Maintenance system via the following link to complete the nomination: https://pkidm.dmdc.osd.mil/appj/pcols-web/TokenHandlerAction.do?newSession=true&redeemToken=355109223

You will need to authenticate yourself using your Common Access Card (CAC).

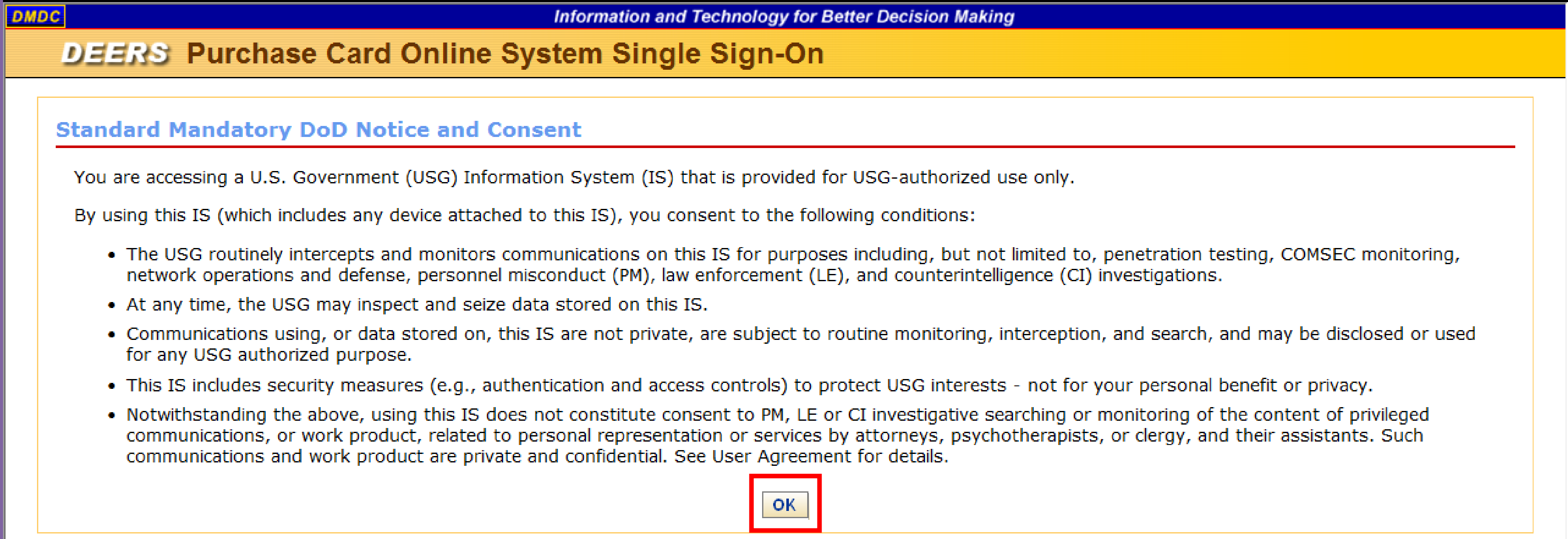
If the above link does not work, log in to AIM using the following link https://pkidm.dmdc.osd.mil/appj/pcols-web Copy the following token value 355109223 into the Token text box and click Redeem Token.

For account-related inquiries, please contact your designated Agency/Organization Program Coordinator. For PCOLS technical support, including system access, please contact the PCOLS help desk at the below phone numbers or by email at mailto:dlacontactcenter@dla.mil.

- US (CONUS) - Commercial (toll-free): 1-800-376-7783
- OCONUS - DSN: 661-7307
- Direct dial: 269-961-7307

AIM Logon: https://pkidm.dmdc.osd.mil/appj/pcols-web/index.jsp

Click the “OK” button.



DMDC
Information and Technology for Better Decision Making
DEERS Purchase Card Online System Single Sign-On

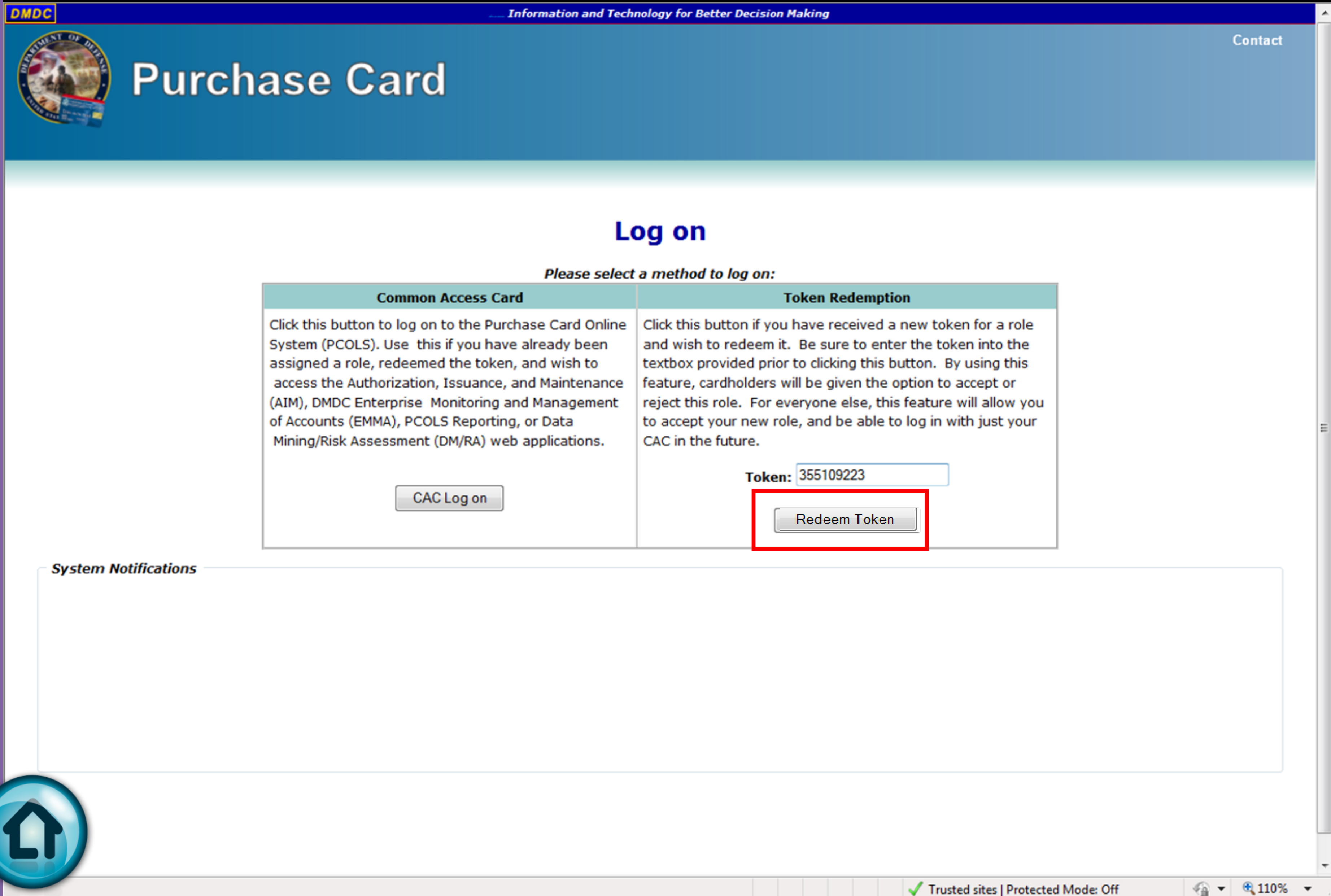
Standard Mandatory DoD Notice and Consent

You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only.

By using this IS (which includes any device attached to this IS), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests - not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential. See User Agreement for details.

The token number has been entered. Click the “Redeem Token” button.



DMDC Information and Technology for Better Decision Making

Contact

Purchase Card

Log on

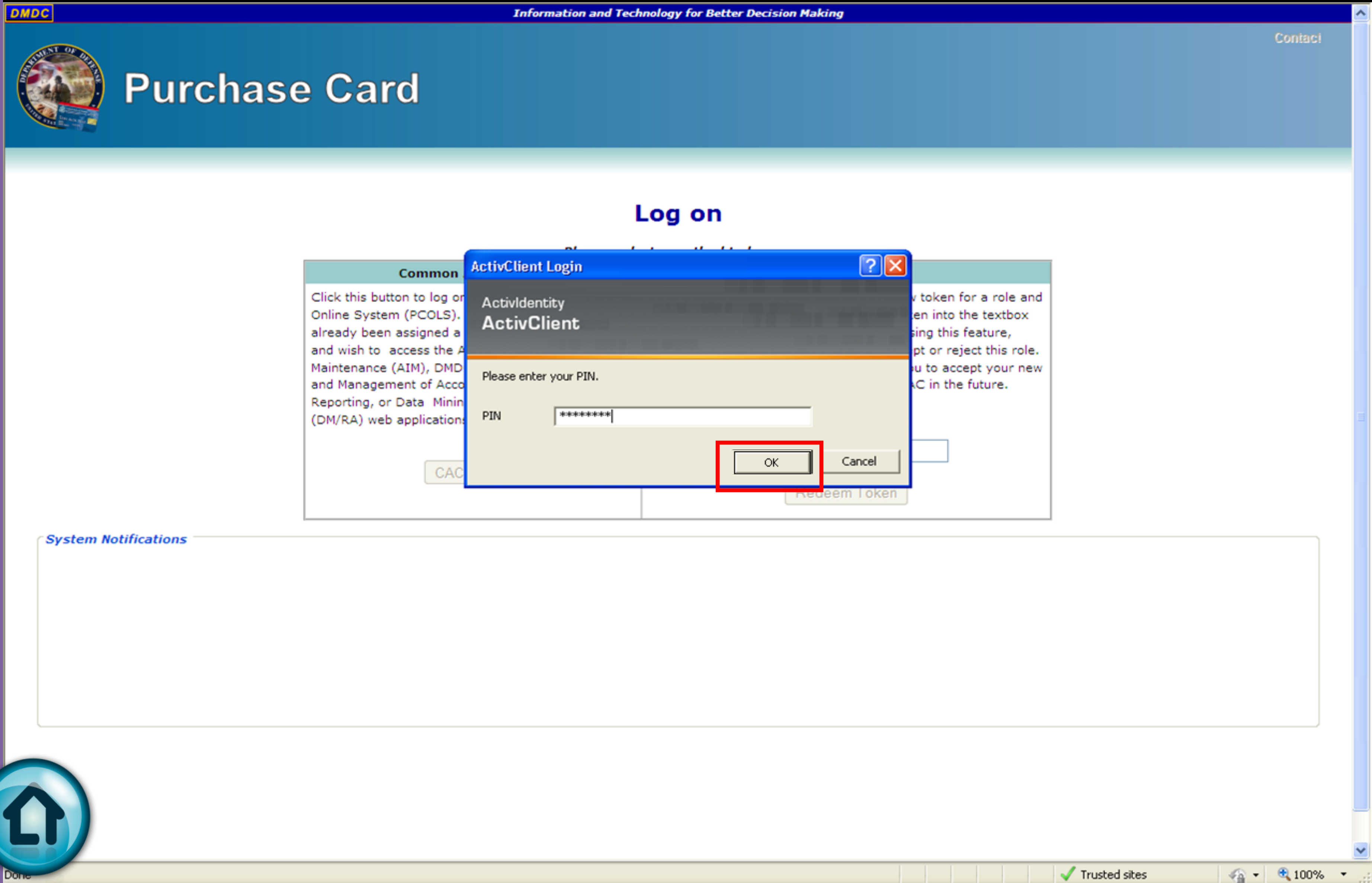
Please select a method to log on:

Common Access Card	Token Redemption
Click this button to log on to the Purchase Card Online System (PCOLS). Use this if you have already been assigned a role, redeemed the token, and wish to access the Authorization, Issuance, and Maintenance (AIM), DMDC Enterprise Monitoring and Management of Accounts (EMMA), PCOLS Reporting, or Data Mining/Risk Assessment (DM/RA) web applications.	Click this button if you have received a new token for a role and wish to redeem it. Be sure to enter the token into the textbox provided prior to clicking this button. By using this feature, cardholders will be given the option to accept or reject this role. For everyone else, this feature will allow you to accept your new role, and be able to log in with just your CAC in the future.

Token: 355109223

System Notifications

The RM has entered their pin. Click the “OK” button.



DMDC

Information and Technology for Better Decision Making

Contact

Purchase Card

Log on

Common

Click this button to log on
Online System (PCOLS).
already been assigned a
and wish to access the A
Maintenance (AIM), DMD
and Management of Acco
Reporting, or Data Minin
(DM/RA) web application

CAC

token for a role and
en into the textbox
sing this feature,
pt or reject this role.
u to accept your new
C in the future.

Redeem Token

ActivClient Login

ActivIdentity
ActivClient

Please enter your PIN.

PIN *********

OK

Cancel

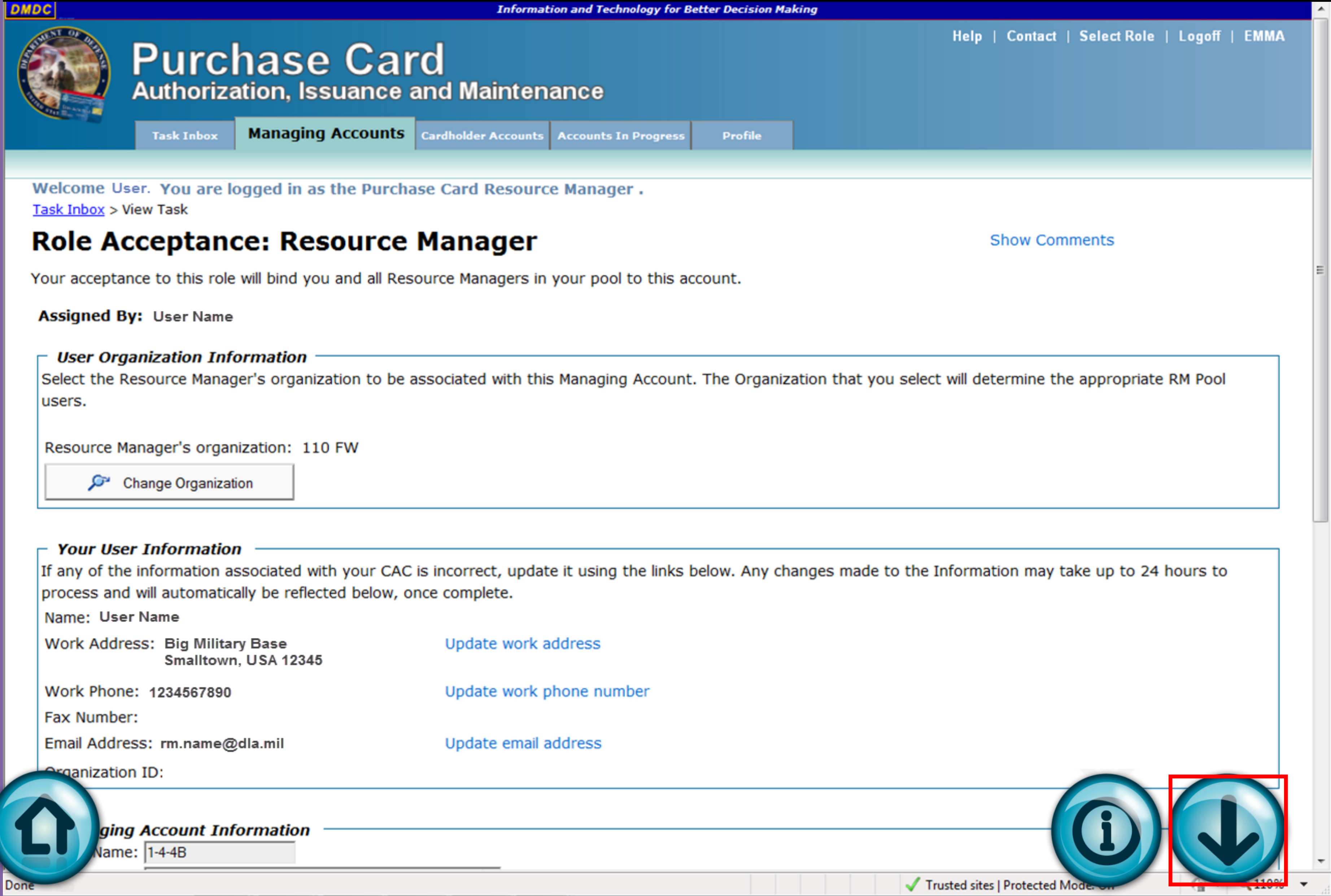
System Notifications

Done

Trusted sites

100%

The RM has been redirected to accept their role. Click on the arrow to scroll down.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

Welcome User. You are logged in as the Purchase Card Resource Manager .

Task Inbox > View Task

Role Acceptance: Resource Manager

Show Comments

Your acceptance to this role will bind you and all Resource Managers in your pool to this account.

Assigned By: User Name

User Organization Information

Select the Resource Manager's organization to be associated with this Managing Account. The Organization that you select will determine the appropriate RM Pool users.

Resource Manager's organization: 110 FW

Change Organization

Your User Information

If any of the information associated with your CAC is incorrect, update it using the links below. Any changes made to the Information may take up to 24 hours to process and will automatically be reflected below, once complete.

Name: User Name

Work Address: Big Military Base
Smalltown, USA 12345

Update work address

Work Phone: 1234567890

Update work phone number

Fax Number:

Email Address: rm.name@dla.mil

Update email address

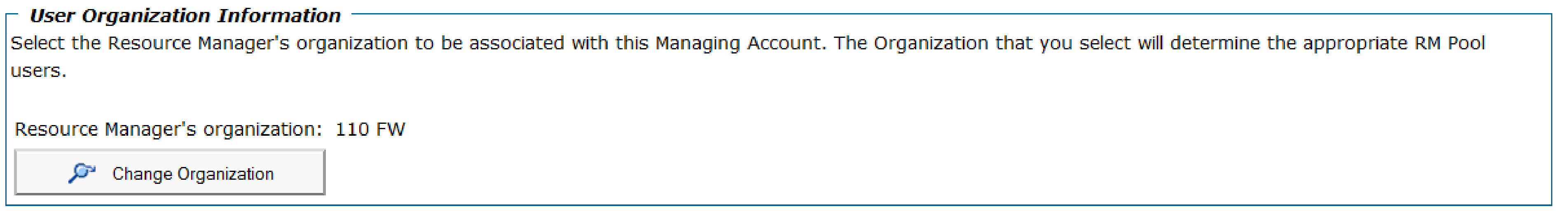
Organization ID:

ging Account Information

Name: 1-4-4B

Done
Trusted sites | Protected Mode: On

If the **Organization** listed is not the correct organization, the RM can click the **Change Organization** button.

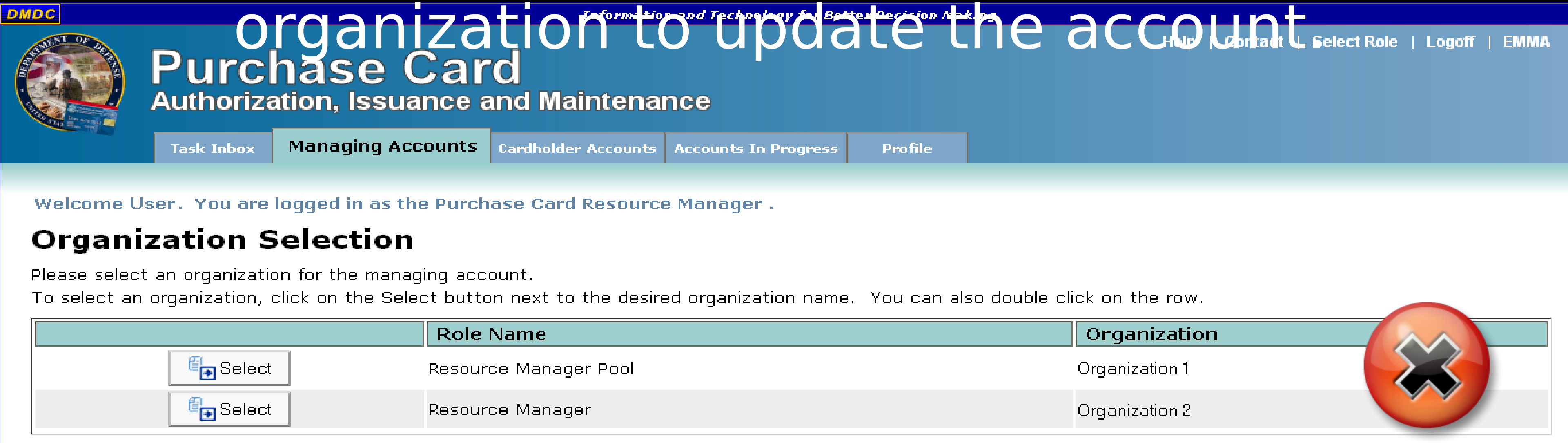

Change Organization

User Organization Information

Select the Resource Manager's organization to be associated with this Managing Account. The Organization that you select will determine the appropriate RM Pool users.

Resource Manager's organization: 110 FW

The RM would then need to click the “Select” button next to the name of the correct organization to update the account


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

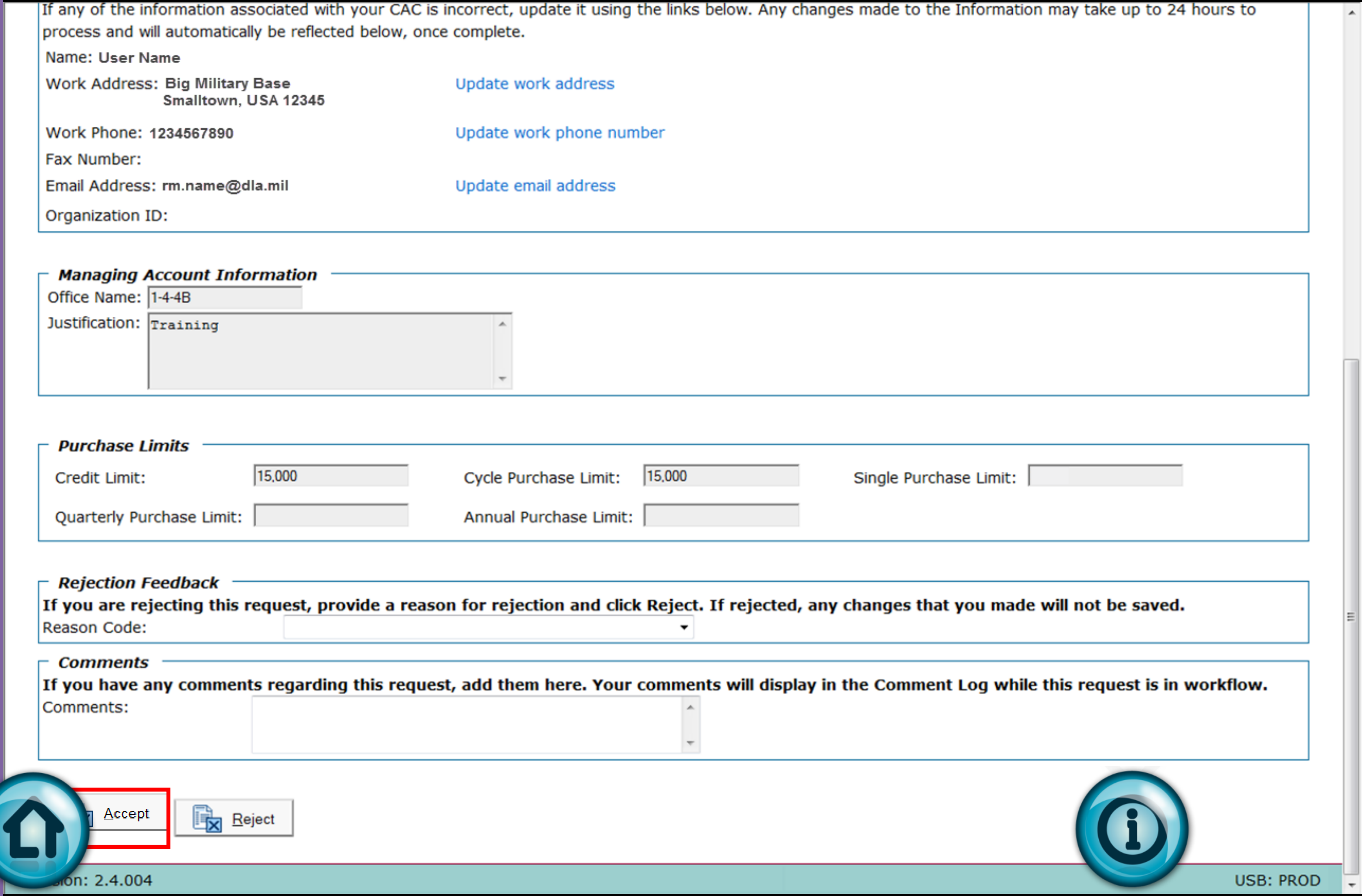
Welcome User. You are logged in as the Purchase Card Resource Manager .

Organization Selection

Please select an organization for the managing account.
To select an organization, click on the Select button next to the desired organization name. You can also double click on the row.

	Role Name	Organization
Select	Resource Manager Pool	Organization 1
Select	Resource Manager	Organization 2

Click the “Accept” button to be assigned to this managing account as the RM.



If any of the information associated with your CAC is incorrect, update it using the links below. Any changes made to the Information may take up to 24 hours to process and will automatically be reflected below, once complete.

Name: **User Name**

Work Address: **Big Military Base**
Smalltown, USA 12345

Work Phone: **1234567890**

Fax Number:

Email Address: **rm.name@dla.mil**

Organization ID:

Managing Account Information

Office Name: 1-4-4B

Justification: Training

Purchase Limits

Credit Limit:	15,000	Cycle Purchase Limit:	15,000	Single Purchase Limit:	
Quarterly Purchase Limit:		Annual Purchase Limit:			

Rejection Feedback

If you are rejecting this request, provide a reason for rejection and click Reject. If rejected, any changes that you made will not be saved.

Reason Code:

Comments

If you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in workflow.

Comments:

sion: 2.4.004

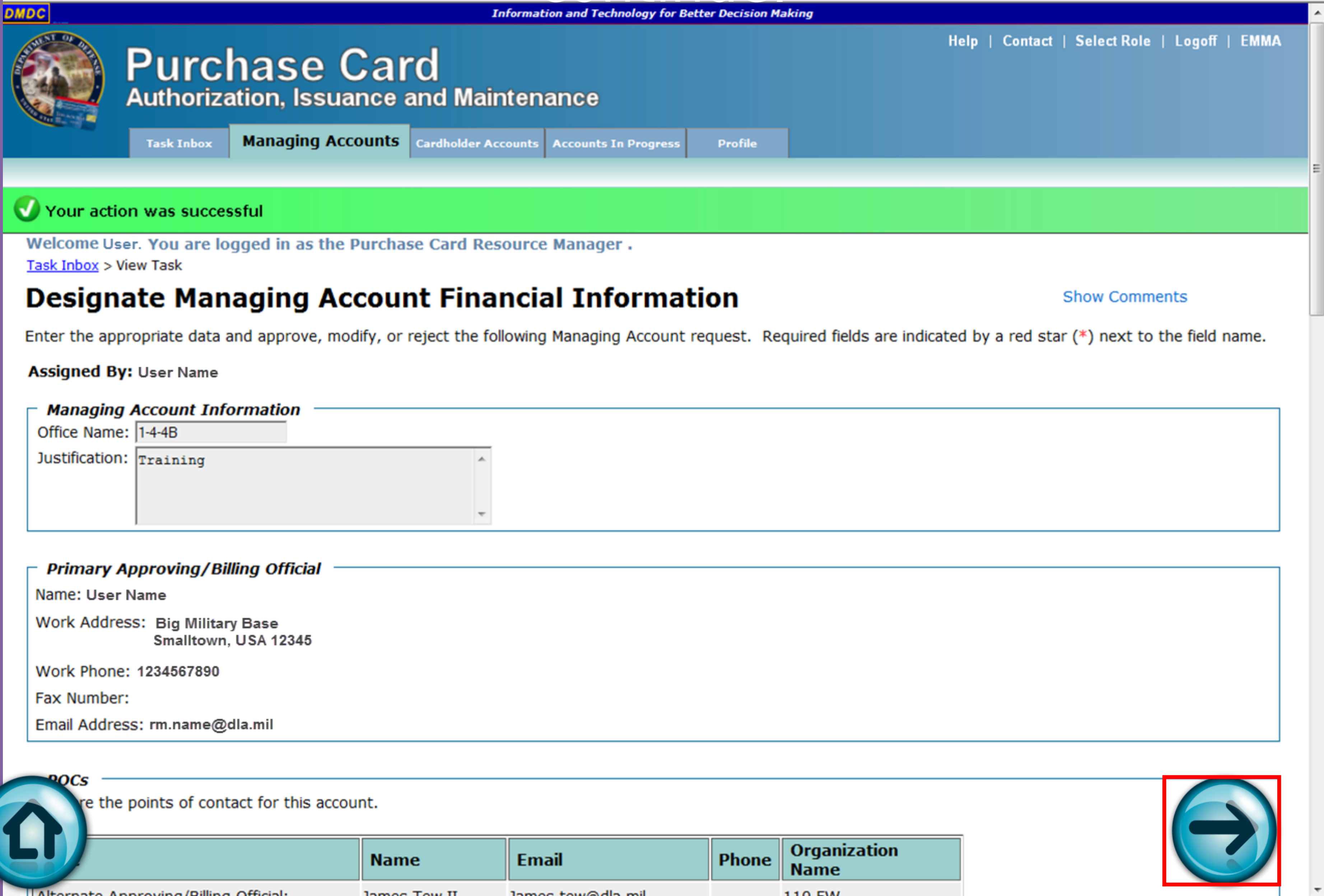
USB: PROD

Resource Manager and Resource Manager Pool

Within the Managing Account process, the Resource Manager (RM) is responsible for entering all financial information and approving the Managing Account. The RM has the authority to approve or reject the Managing Account request. In addition to the RM’s involvement in Managing Account creation, an RM or a member of the RM Pool can also view, update, or reject a Managing Account.

M AIM: Action 1 Accept Nomination as RM on MA

The action was successful. Click the arrow to continue.



DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

✓ Your action was successful

Welcome User. You are logged in as the Purchase Card Resource Manager .

Task Inbox > View Task

Designate Managing Account Financial Information

Show Comments

Enter the appropriate data and approve, modify, or reject the following Managing Account request. Required fields are indicated by a red star (*) next to the field name.

Assigned By: User Name

Managing Account Information

Office Name: 1-4-4B

Justification: Training

Primary Approving/Billing Official

Name: User Name

Work Address: Big Military Base
Smalltown, USA 12345

Work Phone: 1234567890

Fax Number:

Email Address: rm.name@dla.mil

POCs

re the points of contact for this account.

	Name	Email	Phone	Organization Name

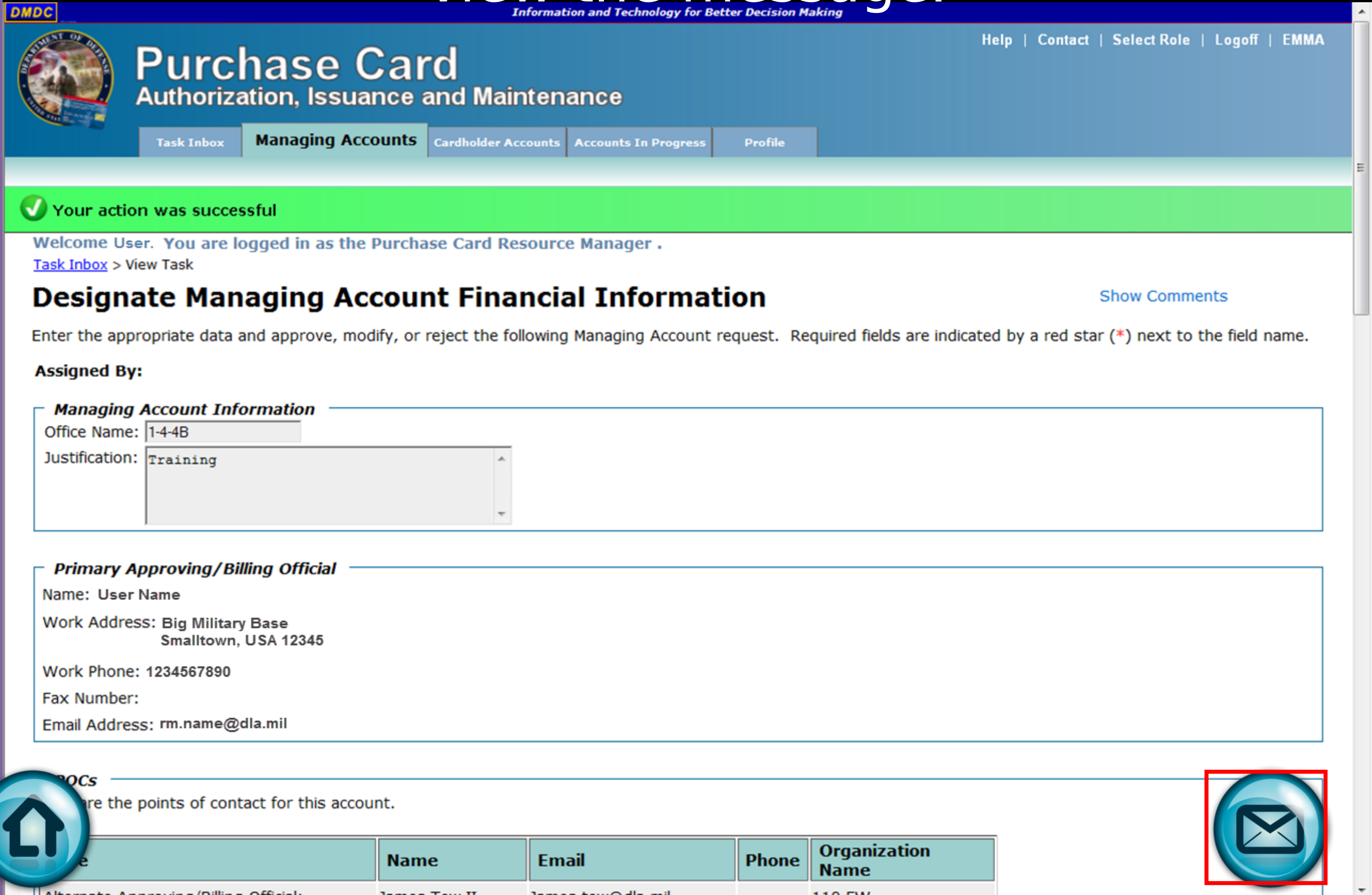
RM Action 1

Complete

RM Action 2

AIM: Approve the Financial Resources of the Following Managing Account

While still in AIM, the RM has received a new PCOLS Task email. Click on the email icon to view the message.


DMDC
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Purchase Card
Authorization, Issuance and Maintenance
Help | Contact | Select Role | Logoff | EMMA
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

✓ Your action was successful

Welcome User. You are logged in as the Purchase Card Resource Manager .

Task Inbox > View Task

Designate Managing Account Financial Information

Show Comments

Enter the appropriate data and approve, modify, or reject the following Managing Account request. Required fields are indicated by a red star (*) next to the field name.

Assigned By:

Managing Account Information

Office Name: 1-4-4B

Justification: Training

Primary Approving/Billing Official

Name: **User Name**

Work Address: **Big Military Base**
Smalltown, USA 12345

Work Phone: **1234567890**

Fax Number:

Email Address: **rm.name@dla.mil**

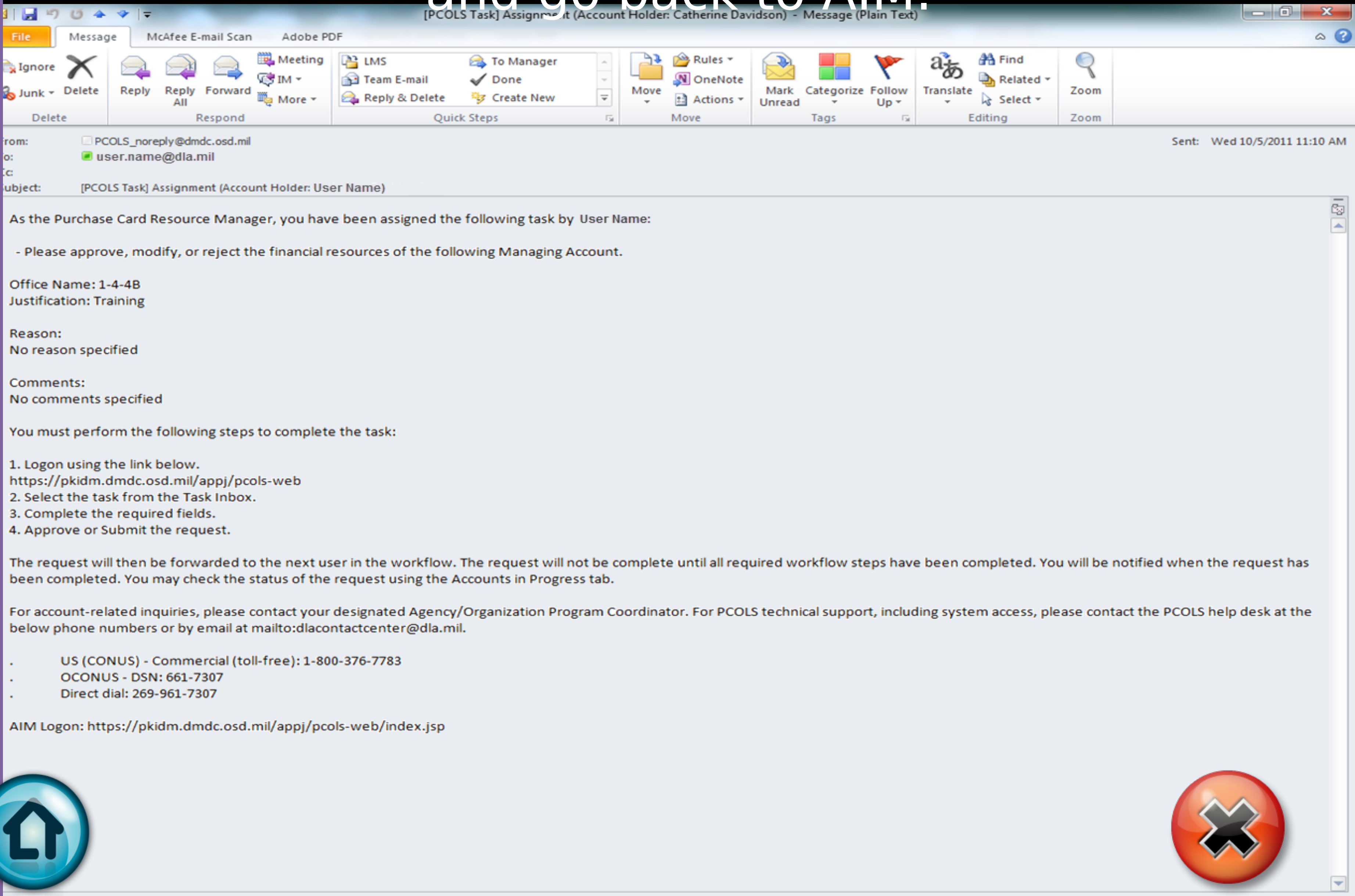
OCs

re the points of contact for this account.

e	Name	Email	Phone	Organization Name

M Action 2 AIM: Accept Nomination as RM on MA

The RM has received a new PCOLS Task email to "approve, modify, or reject the following Managing Account." Click on the "X" to exit out of the email and go back to AIM.


[PCOLS Task] Assignment (Account Holder: Catherine Davidson) - Message (Plain Text)
File
Message
McAfee E-mail Scan
Adobe PDF
Ignore
Junk
Delete
Delete
Reply
Reply All
Forward
Meeting
IM
More
Respond
LMS
Team E-mail
Reply & Delete
To Manager
Done
Create New
Quick Steps
Move
Rules
OneNote
Actions
Move
Mark Unread
Categorize
Follow Up
Tags
Translate
Find
Related
Select
Editing
Zoom
Zoom

rom: PCOLS_noreply@dmdc.osd.mil
o: user.name@dla.mil
c:
ubject: [PCOLS Task] Assignment (Account Holder: User Name)

Sent: Wed 10/5/2011 11:10 AM

As the Purchase Card Resource Manager, you have been assigned the following task by User Name:

- Please approve, modify, or reject the financial resources of the following Managing Account.

Office Name: 1-4-4B
Justification: Training

Reason:
No reason specified

Comments:
No comments specified

You must perform the following steps to complete the task:

1. Logon using the link below.
https://pkidm.dmdc.osd.mil/appj/pcols-web
2. Select the task from the Task Inbox.
3. Complete the required fields.
4. Approve or Submit the request.

The request will then be forwarded to the next user in the workflow. The request will not be complete until all required workflow steps have been completed. You will be notified when the request has been completed. You may check the status of the request using the Accounts in Progress tab.

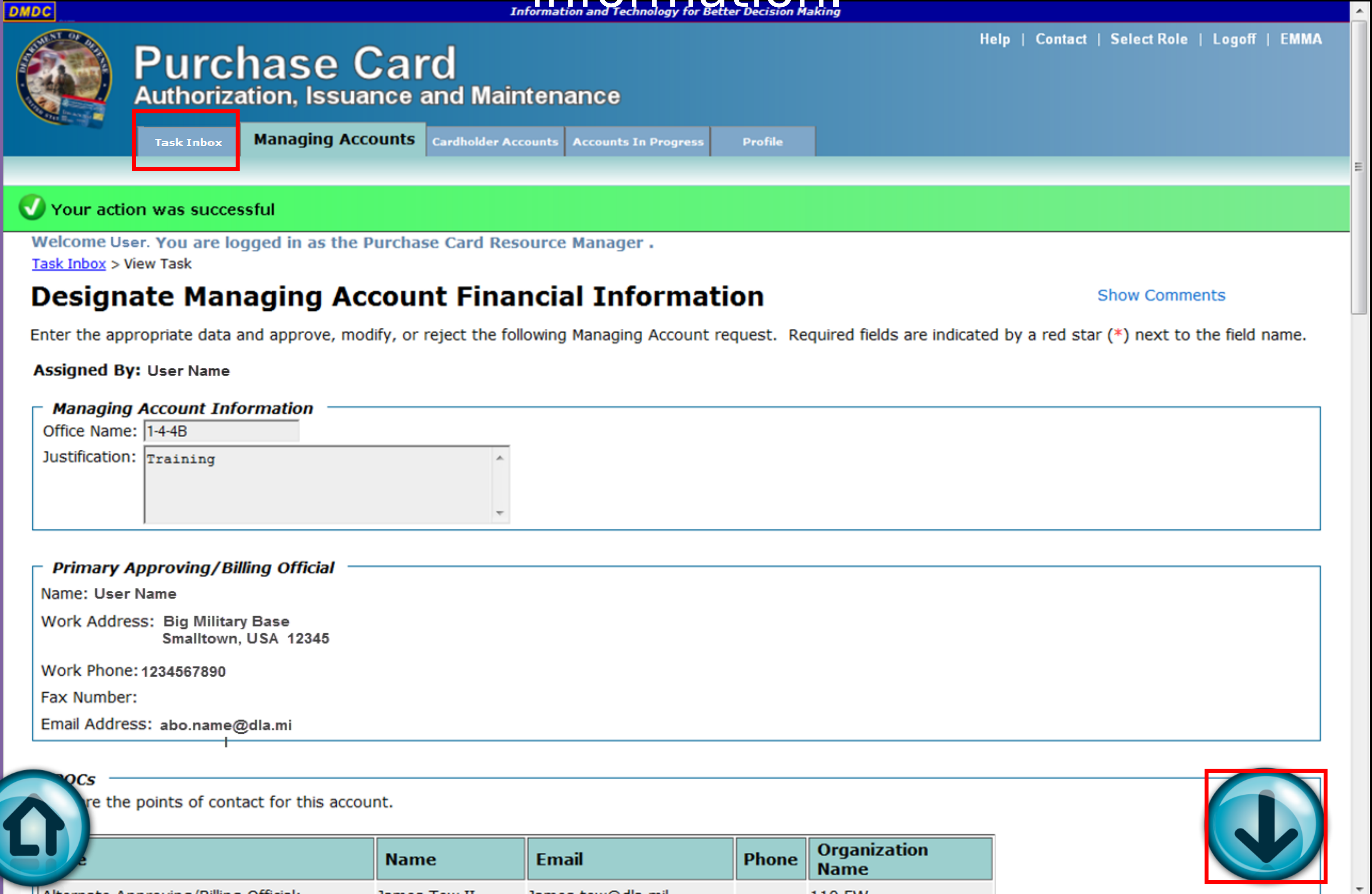
For account-related inquiries, please contact your designated Agency/Organization Program Coordinator. For PCOLS technical support, including system access, please contact the PCOLS help desk at the below phone numbers or by email at mailto:dlacontactcenter@dla.mil.

- US (CONUS) - Commercial (toll-free): 1-800-376-7783
- OCONUS - DSN: 661-7307
- Direct dial: 269-961-7307

AIM Logon: https://pkidm.dmdc.osd.mil/appj/pcols-web/index.jsp

Action 2 AIM: Approve the Financial Resources of the Following MA

The new task can be found in the Task Inbox. The RM can also scroll down on the current screen to designate the Managing Account financial information.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile
Show Comments

✓ Your action was successful

Welcome User. You are logged in as the Purchase Card Resource Manager .

Task Inbox > View Task

Designate Managing Account Financial Information

Enter the appropriate data and approve, modify, or reject the following Managing Account request. Required fields are indicated by a red star (*) next to the field name.

Assigned By: User Name

Managing Account Information

Office Name: 1-4-4B

Justification: Training

Primary Approving/Billing Official

Name: User Name

Work Address: Big Military Base
Smalltown, USA 12345

Work Phone: 1234567890

Fax Number:

Email Address: abo.name@dla.mi

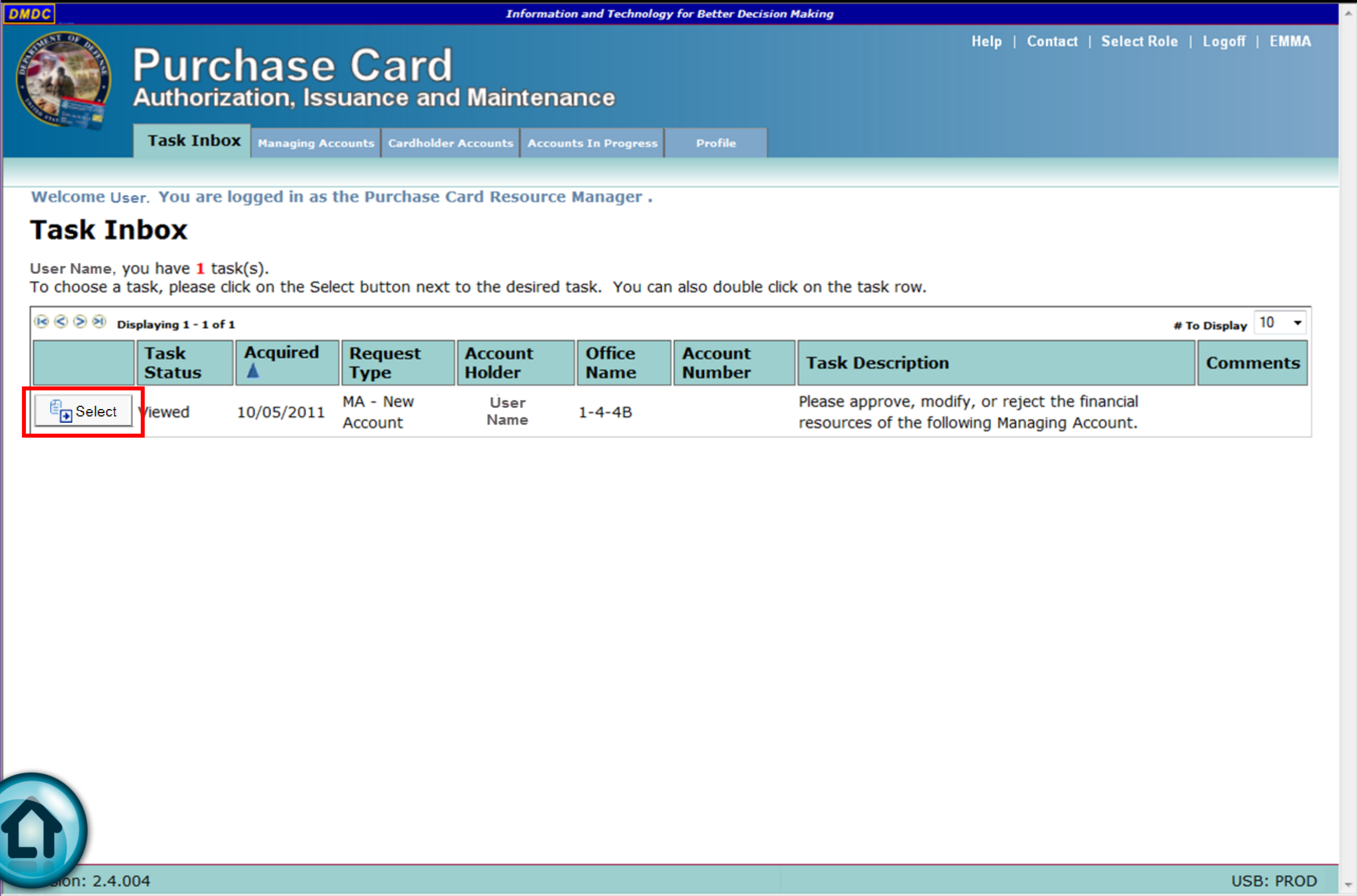
OCs

re the points of contact for this account.

e	Name	Email	Phone	Organization Name

Action 2 AIM: Approve the Financial Resources of the Following MA

Click on the "Select" button to view the new task.



DMDC Information and Technology for Better Decision Making

Help | Contact | Select Role | Logoff | EMMA

Purchase Card
Authorization, Issuance and Maintenance

Welcome User. You are logged in as the Purchase Card Resource Manager .

Task Inbox

User Name, you have 1 task(s).
To choose a task, please click on the Select button next to the desired task. You can also double click on the task row.

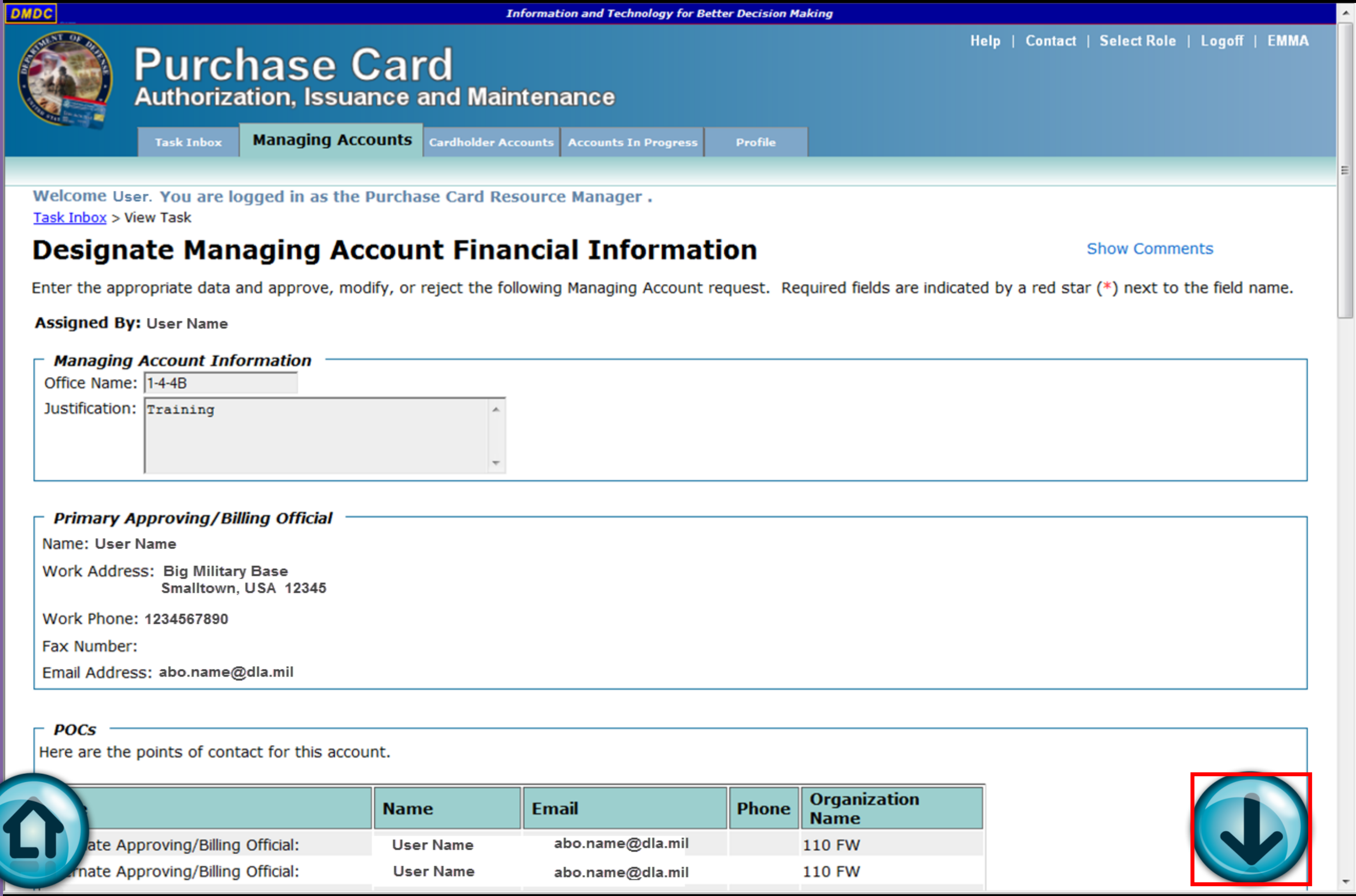
Displaying 1 - 1 of 1 # To Display 10

	Task Status	Acquired	Request Type	Account Holder	Office Name	Account Number	Task Description	Comments
Select	Viewed	10/05/2011	MA - New Account	User Name	1-4-4B		Please approve, modify, or reject the financial resources of the following Managing Account.	

sion: 2.4.004 USB: PROD

The Managing Account Information and POCs are listed. Click the arrow to scroll down.

Action 2 AIM: Approve the Financial Resources of the
Following MA


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

Welcome User. You are logged in as the Purchase Card Resource Manager .

Task Inbox > View Task

Designate Managing Account Financial Information

Show Comments

Enter the appropriate data and approve, modify, or reject the following Managing Account request. Required fields are indicated by a red star (*) next to the field name.

Assigned By: User Name

Managing Account Information

Office Name: 1-4-4B

Justification: Training

Primary Approving/Billing Official

Name: User Name

Work Address: Big Military Base
Smalltown, USA 12345

Work Phone: 1234567890

Fax Number:

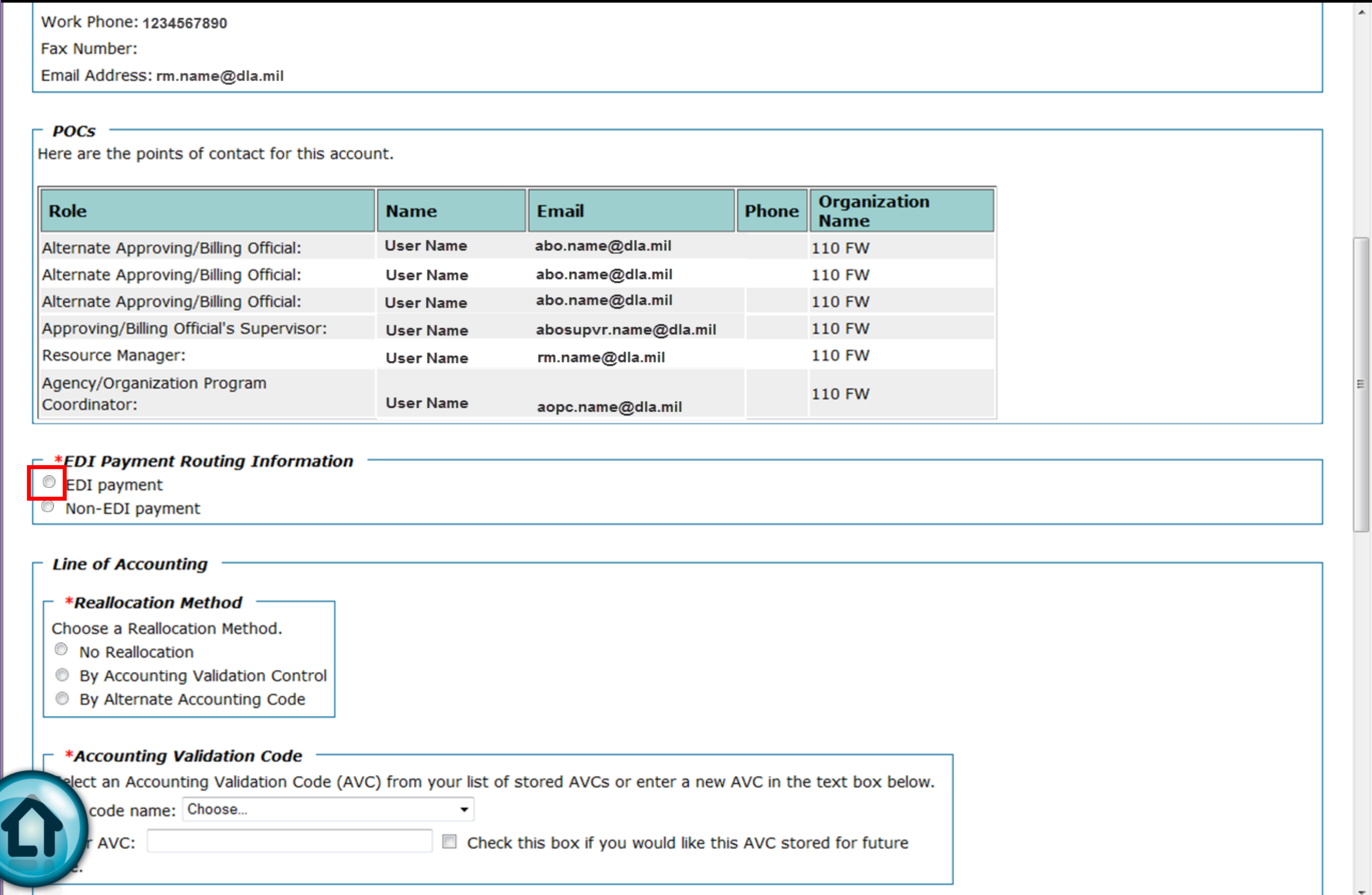
Email Address: abo.name@dla.mil

POCs

Here are the points of contact for this account.

	Name	Email	Phone	Organization Name
ate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
rnate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW

The RM is required to click on the radio button to select the desired **EDI Payment Routing Information**. Click on the radio button.



Work Phone: 1234567890
Fax Number:
Email Address: rm.name@dla.mil

POCs

Here are the points of contact for this account.

Role	Name	Email	Phone	Organization Name
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Approving/Billing Official's Supervisor:	User Name	abosupvr.name@dla.mil		110 FW
Resource Manager:	User Name	rm.name@dla.mil		110 FW
Agency/Organization Program Coordinator:	User Name	aopc.name@dla.mil		110 FW

****EDI Payment Routing Information***

○ EDI payment
○ Non-EDI payment

Line of Accounting

****Reallocation Method***

Choose a Reallocation Method.
○ No Reallocation
○ By Accounting Validation Control
○ By Alternate Accounting Code

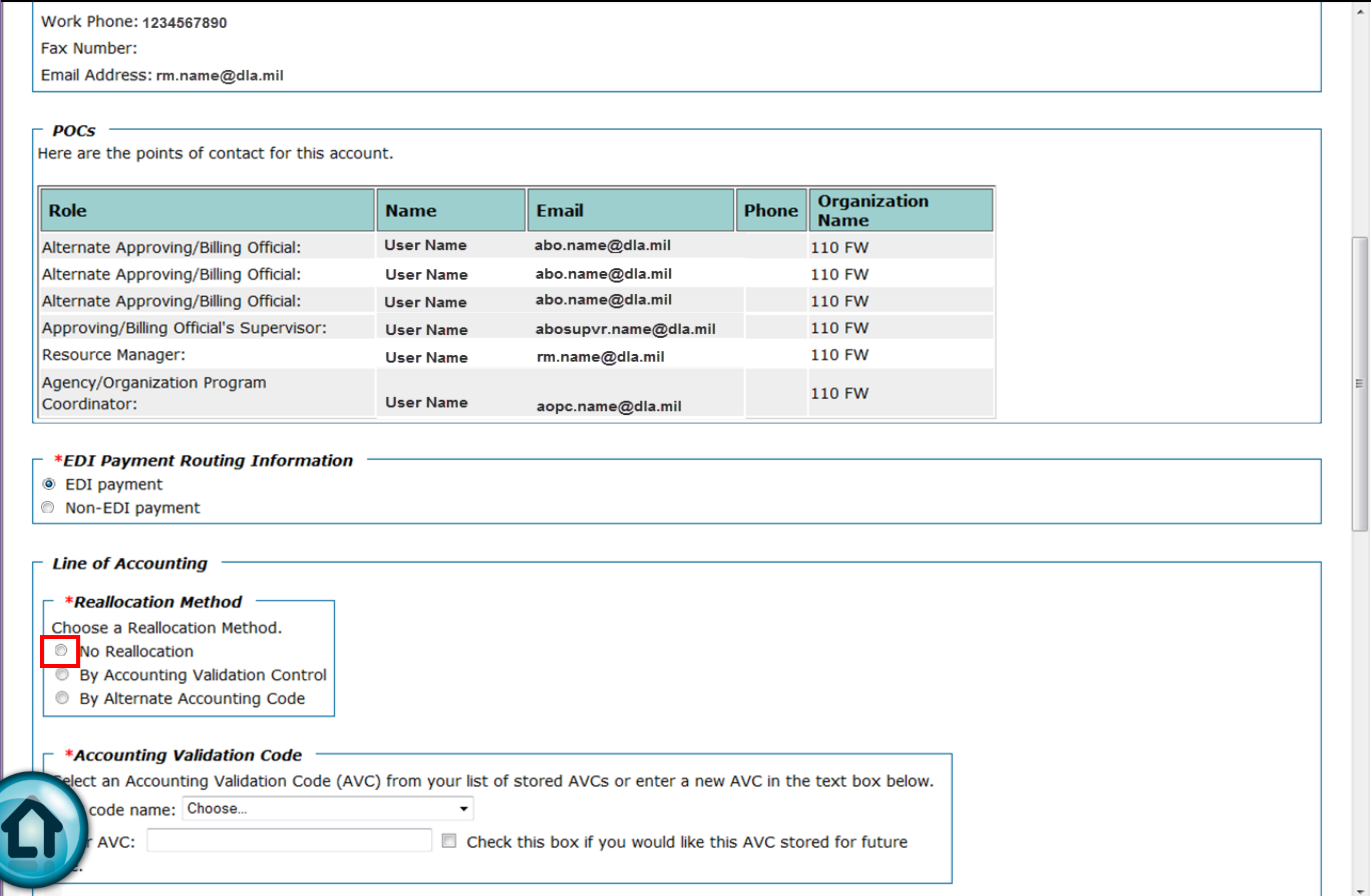
****Accounting Validation Code***

elect an Accounting Validation Code (AVC) from your list of stored AVCs or enter a new AVC in the text box below.

code name: Choose...

r AVC: ☐ Check this box if you would like this AVC stored for future
e.

The RM is required to click on the radio button to select the desired **Reallocation Method**. Click on the radio button.



Work Phone: 1234567890

Fax Number:

Email Address: rm.name@dla.mil

POCs

Here are the points of contact for this account.

Role	Name	Email	Phone	Organization Name
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Approving/Billing Official's Supervisor:	User Name	abosupvr.name@dla.mil		110 FW
Resource Manager:	User Name	rm.name@dla.mil		110 FW
Agency/Organization Program Coordinator:	User Name	aopc.name@dla.mil		110 FW

****EDI Payment Routing Information***

● EDI payment

○ Non-EDI payment

Line of Accounting

****Reallocation Method***

Choose a Reallocation Method.

○ No Reallocation

○ By Accounting Validation Control

○ By Alternate Accounting Code

****Accounting Validation Code***

elect an Accounting Validation Code (AVC) from your list of stored AVCs or enter a new AVC in the text box below.

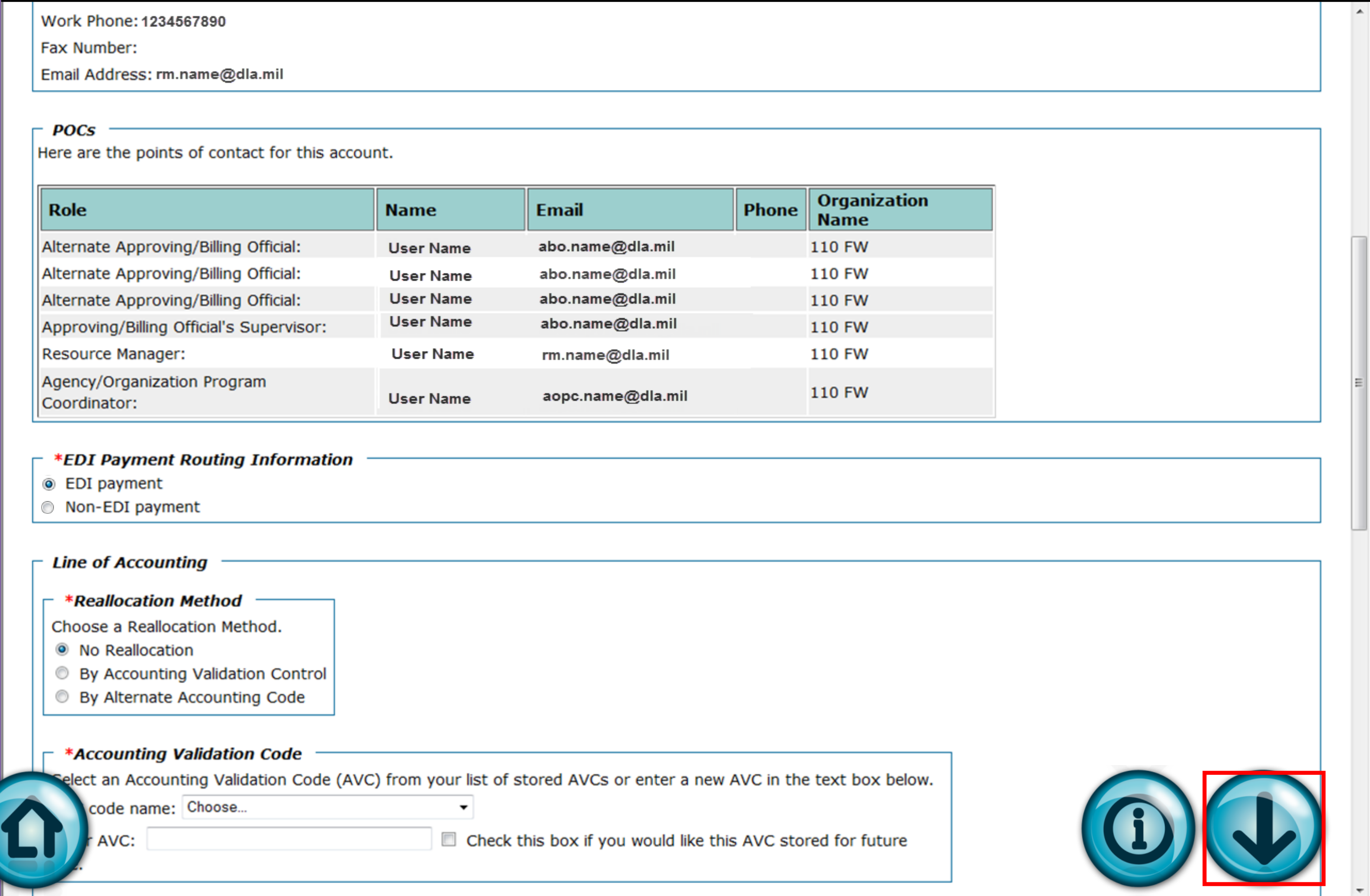
code name: Choose...

r AVC: ☐ Check this box if you would like this AVC stored for future

e.

M Action 2 AIM: Approve the Financial Resources of the Following MA

The RM has selected the **EDI Payment Routing Information** and the **Reallocation Method**. Click on the arrow to scroll down.



Work Phone: 1234567890
Fax Number:
Email Address: rm.name@dla.mil

POCs

Here are the points of contact for this account.

Role	Name	Email	Phone	Organization Name
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Approving/Billing Official's Supervisor:	User Name	abo.name@dla.mil		110 FW
Resource Manager:	User Name	rm.name@dla.mil		110 FW
Agency/Organization Program Coordinator:	User Name	aopc.name@dla.mil		110 FW

****EDI Payment Routing Information***

● EDI payment
○ Non-EDI payment

Line of Accounting

****Reallocation Method***

Choose a Reallocation Method.
● No Reallocation
○ By Accounting Validation Control
○ By Alternate Accounting Code

****Accounting Validation Code***

elect an Accounting Validation Code (AVC) from your list of stored AVCs or enter a new AVC in the text box below.

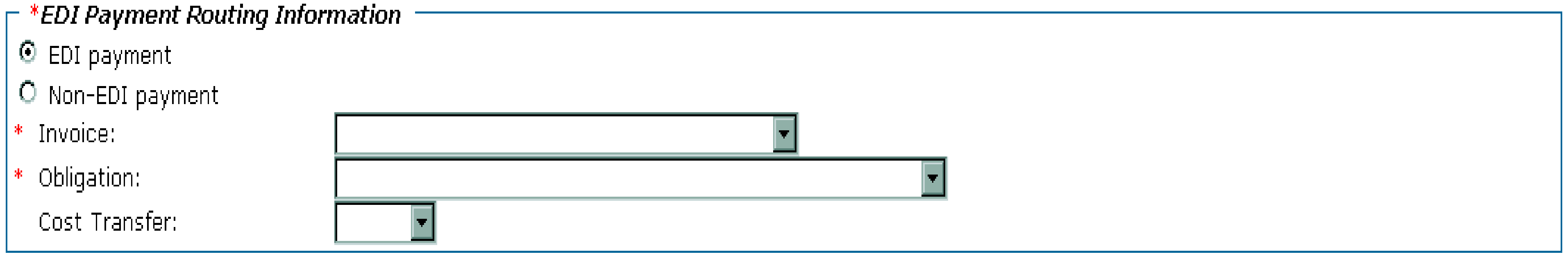
code name: Choose...

r AVC: ☐ Check this box if you would like this AVC stored for future

e.

Note on **EDI**: Army, Air Force, and Defense Agency customers, if the RM selects EDI payment, they are also required to enter the following information:

i. Invoice
ii. Obligation

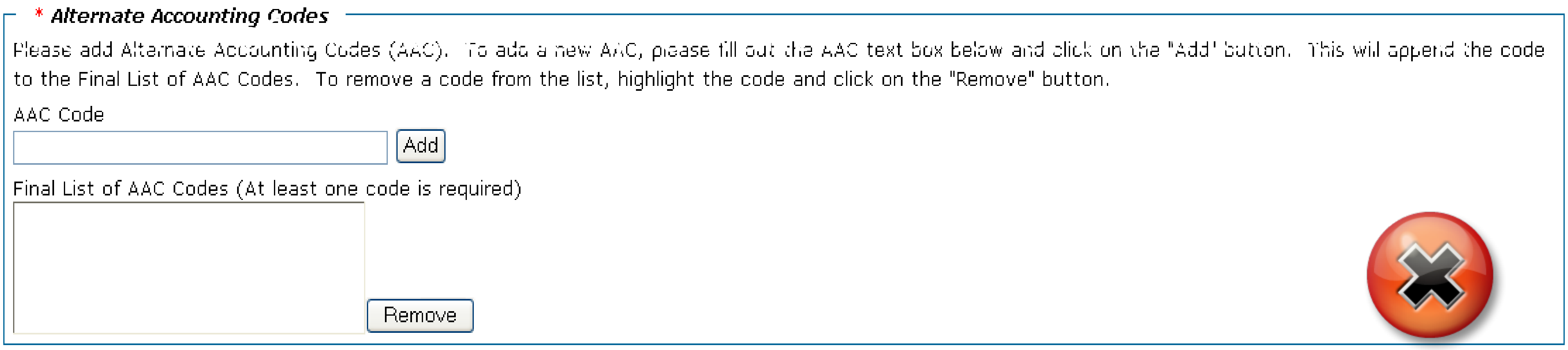


***EDI Payment Routing Information**

● EDI payment
○ Non-EDI payment

* Invoice:
* Obligation:
Cost Transfer:

Note on **Reallocation Method**: If the RM chooses **By Alternate Accounting Code (AAC),** an Alternate Accounting Codes box will display below the Default Accounting Codes. The RM is required to enter an AAC Code and click Add. The AAC Code is displayed in the Final List of AAC Codes. If the RM needs to remove an AAC Code, click



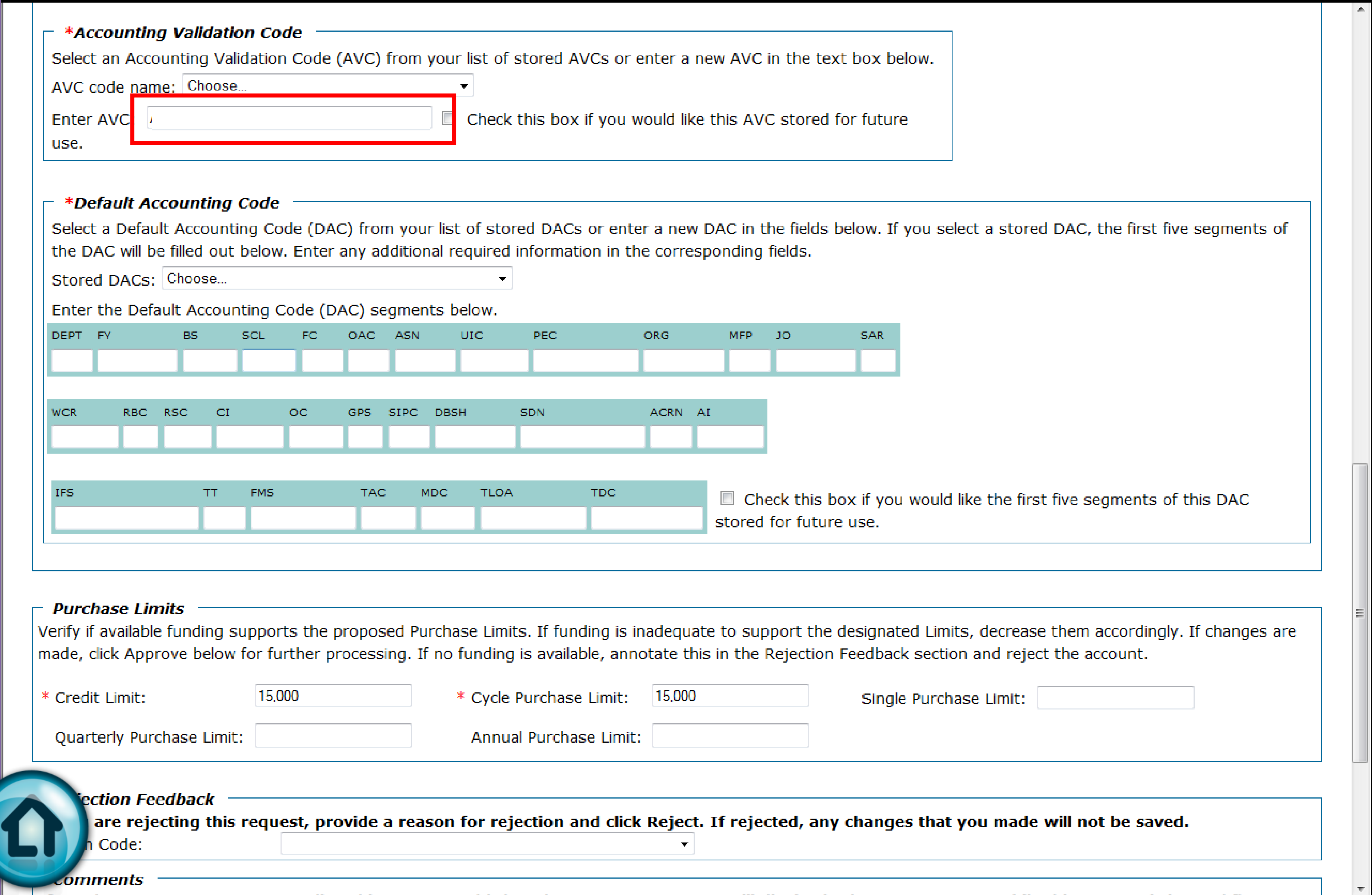
*** Alternate Accounting Codes**

Please add Alternate Accounting Codes (AAC). To add a new AAC, please fill out the AAC text box below and click on the "Add" button. This will append the code to the Final List of AAC Codes. To remove a code from the list, highlight the code and click on the "Remove" button.

AAC Code

Final List of AAC Codes (At least one code is required)

The RM will need to enter the Accounting Validation Code. Click on the Enter AVC field.



***Accounting Validation Code**

Select an Accounting Validation Code (AVC) from your list of stored AVCs or enter a new AVC in the text box below.

AVC code name: Choose...

Enter AVC ☐ Check this box if you would like this AVC stored for future use.

***Default Accounting Code**

Select a Default Accounting Code (DAC) from your list of stored DACs or enter a new DAC in the fields below. If you select a stored DAC, the first five segments of the DAC will be filled out below. Enter any additional required information in the corresponding fields.

Stored DACs: Choose...

Enter the Default Accounting Code (DAC) segments below.

DEPT	FY	BS	SCL	FC	OAC	ASN	UIC	PEC	ORG	MFP	JO	SAR

WCR	RBC	RSC	CI	OC	GPS	SIPC	DBSH	SDN	ACRN	AI

IFS	TT	FMS	TAC	MDC	TLOA	TDC

☐ Check this box if you would like the first five segments of this DAC stored for future use.

Purchase Limits

Verify if available funding supports the proposed Purchase Limits. If funding is inadequate to support the designated Limits, decrease them accordingly. If changes are made, click Approve below for further processing. If no funding is available, annotate this in the Rejection Feedback section and reject the account.

* Credit Limit: 15,000
* Cycle Purchase Limit: 15,000
Single Purchase Limit:
Quarterly Purchase Limit:
Annual Purchase Limit:

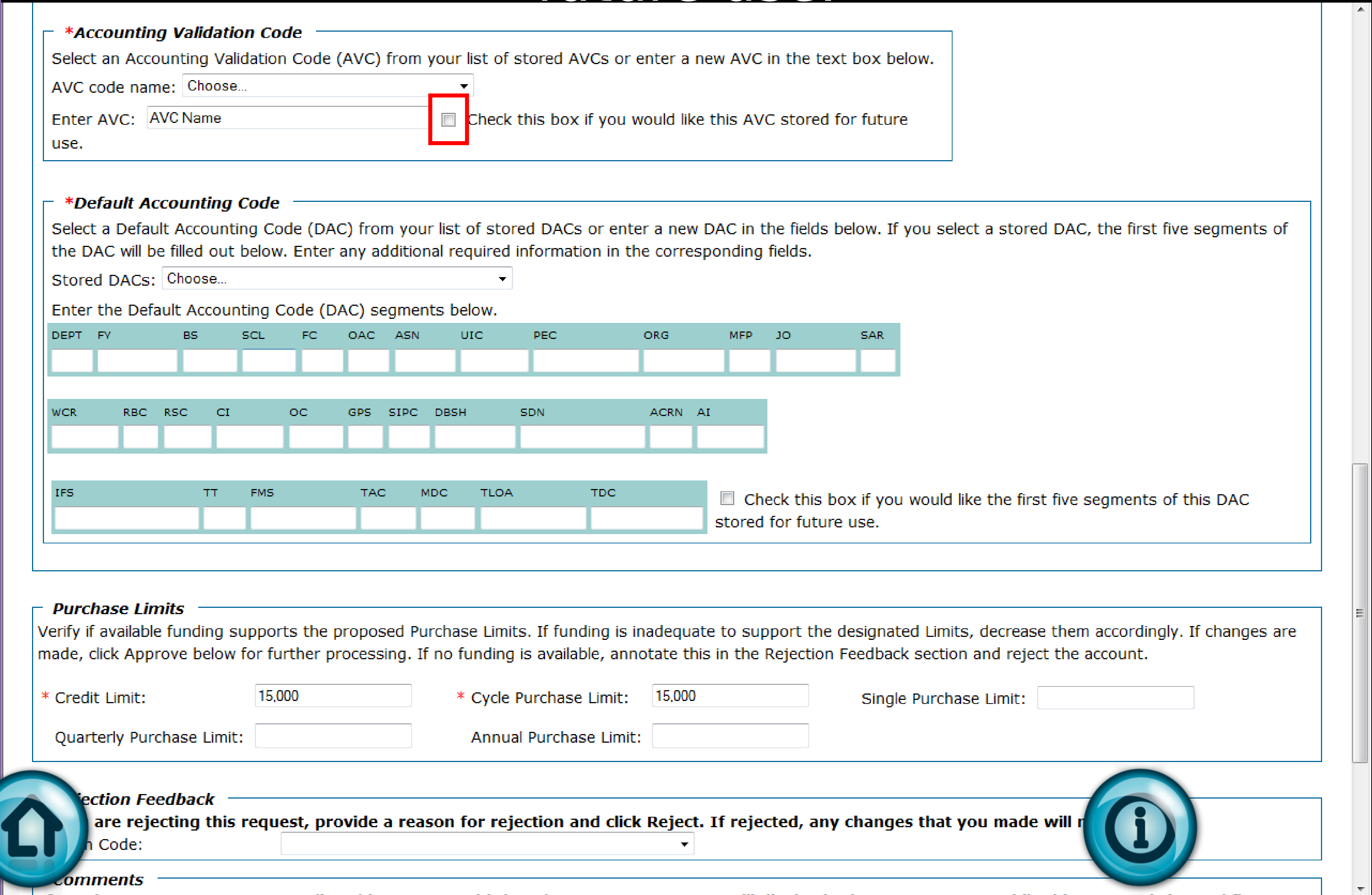
ection Feedback

are rejecting this request, provide a reason for rejection and click Reject. If rejected, any changes that you made will not be saved.

n Code:

omments

The RM has entered the Accounting Validation Code. Check the box to store this AVC for future use.



***Accounting Validation Code**

Select an Accounting Validation Code (AVC) from your list of stored AVCs or enter a new AVC in the text box below.

AVC code name: Choose...

Enter AVC: AVC Name ☐ Check this box if you would like this AVC stored for future use.

***Default Accounting Code**

Select a Default Accounting Code (DAC) from your list of stored DACs or enter a new DAC in the fields below. If you select a stored DAC, the first five segments of the DAC will be filled out below. Enter any additional required information in the corresponding fields.

Stored DACs: Choose...

Enter the Default Accounting Code (DAC) segments below.

DEPT	FY	BS	SCL	FC	OAC	ASN	UIC	PEC	ORG	MFP	JO	SAR

WCR	RBC	RSC	CI	OC	GPS	SIPC	DBSH	SDN	ACRN	AI

IFS	TT	FMS	TAC	MDC	TLOA	TDC

☐ Check this box if you would like the first five segments of this DAC stored for future use.

Purchase Limits

Verify if available funding supports the proposed Purchase Limits. If funding is inadequate to support the designated Limits, decrease them accordingly. If changes are made, click Approve below for further processing. If no funding is available, annotate this in the Rejection Feedback section and reject the account.

* Credit Limit: 15,000

* Cycle Purchase Limit: 15,000

Single Purchase Limit:

Quarterly Purchase Limit:

Annual Purchase Limit:

ection Feedback

are rejecting this request, provide a reason for rejection and click Reject. If rejected, any changes that you made will r

n Code:

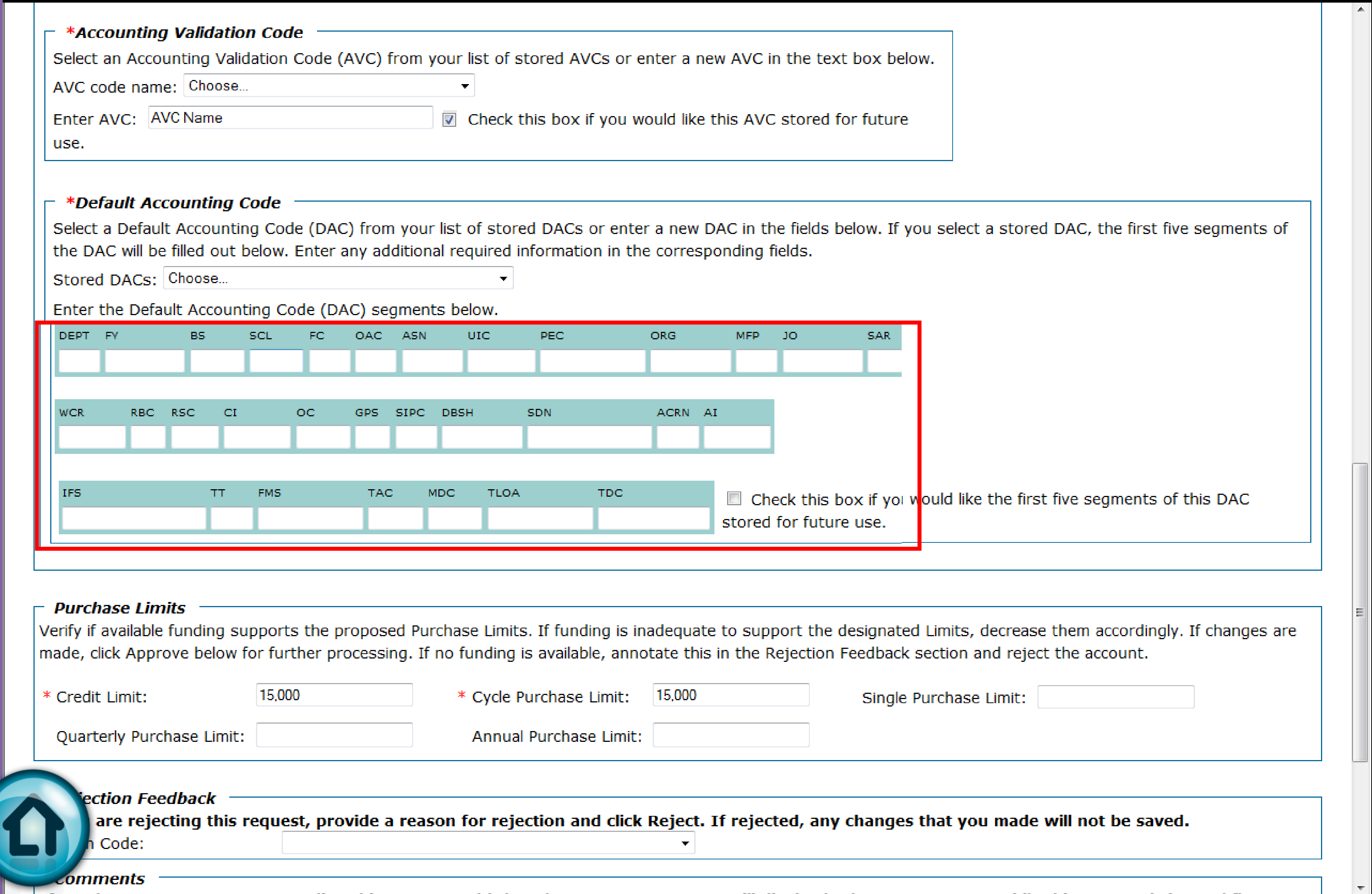
omments

Note: If the RM selects the box to have the AVC or DAC stored for future use, the information will be added to the list of Stored AVCs in their Profile tab once the RM approves the account.

✖

M: Action 2 AIM: Approve the Financial Resources of the
Following MA

The RM will need to enter the Default Accounting Code. Click on a DAC segment.



***Accounting Validation Code**

Select an Accounting Validation Code (AVC) from your list of stored AVCs or enter a new AVC in the text box below.

AVC code name: Choose...

Enter AVC: AVC Name ☑ Check this box if you would like this AVC stored for future use.

***Default Accounting Code**

Select a Default Accounting Code (DAC) from your list of stored DACs or enter a new DAC in the fields below. If you select a stored DAC, the first five segments of the DAC will be filled out below. Enter any additional required information in the corresponding fields.

Stored DACs: Choose...

Enter the Default Accounting Code (DAC) segments below.

☐ Check this box if yo would like the first five segments of this DAC stored for future use.

Purchase Limits

Verify if available funding supports the proposed Purchase Limits. If funding is inadequate to support the designated Limits, decrease them accordingly. If changes are made, click Approve below for further processing. If no funding is available, annotate this in the Rejection Feedback section and reject the account.

* Credit Limit: 15,000

* Cycle Purchase Limit: 15,000

Single Purchase Limit:

Quarterly Purchase Limit:

Annual Purchase Limit:

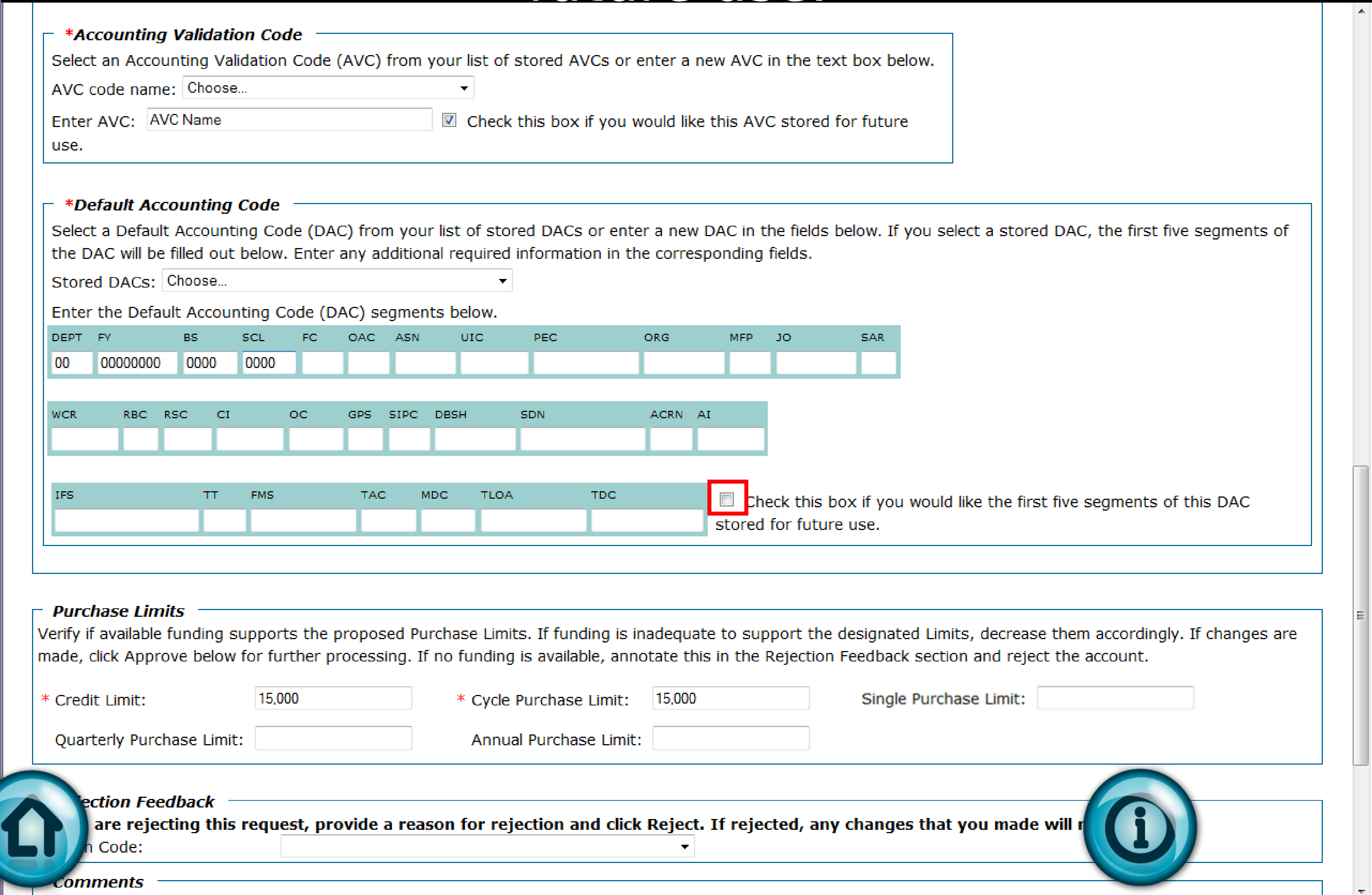
ection Feedback

are rejecting this request, provide a reason for rejection and click Reject. If rejected, any changes that you made will not be saved.

n Code:

omments

The RM has entered the **Default Accounting Code**. Check the box to store this DAC for future use.



***Accounting Validation Code**

Select an Accounting Validation Code (AVC) from your list of stored AVCs or enter a new AVC in the text box below.

AVC code name: Choose...

Enter AVC: AVC Name ☑ Check this box if you would like this AVC stored for future use.

***Default Accounting Code**

Select a Default Accounting Code (DAC) from your list of stored DACs or enter a new DAC in the fields below. If you select a stored DAC, the first five segments of the DAC will be filled out below. Enter any additional required information in the corresponding fields.

Stored DACs: Choose...

Enter the Default Accounting Code (DAC) segments below.

DEPT	FY	BS	SCL	FC	OAC	ASN	UIC	PEC	ORG	MFP	JO	SAR
00	00000000	0000	0000									

WCR	RBC	RSC	CI	OC	GPS	SIPC	DBSH	SDN	ACRN	AI

IFS	TT	FMS	TAC	MDC	TLOA	TDC

☐ Check this box if you would like the first five segments of this DAC stored for future use.

Purchase Limits

Verify if available funding supports the proposed Purchase Limits. If funding is inadequate to support the designated Limits, decrease them accordingly. If changes are made, click Approve below for further processing. If no funding is available, annotate this in the Rejection Feedback section and reject the account.

* Credit Limit: 15,000

* Cycle Purchase Limit: 15,000

Single Purchase Limit:

Quarterly Purchase Limit:

Annual Purchase Limit:

ection Feedback

are rejecting this request, provide a reason for rejection and click Reject. If rejected, any changes that you made will r

n Code:

omments

The **Profile tab** in AIM also provides RMs with the ability to store certain financial information for use during Managing and Cardholder Account issuance and maintenance.

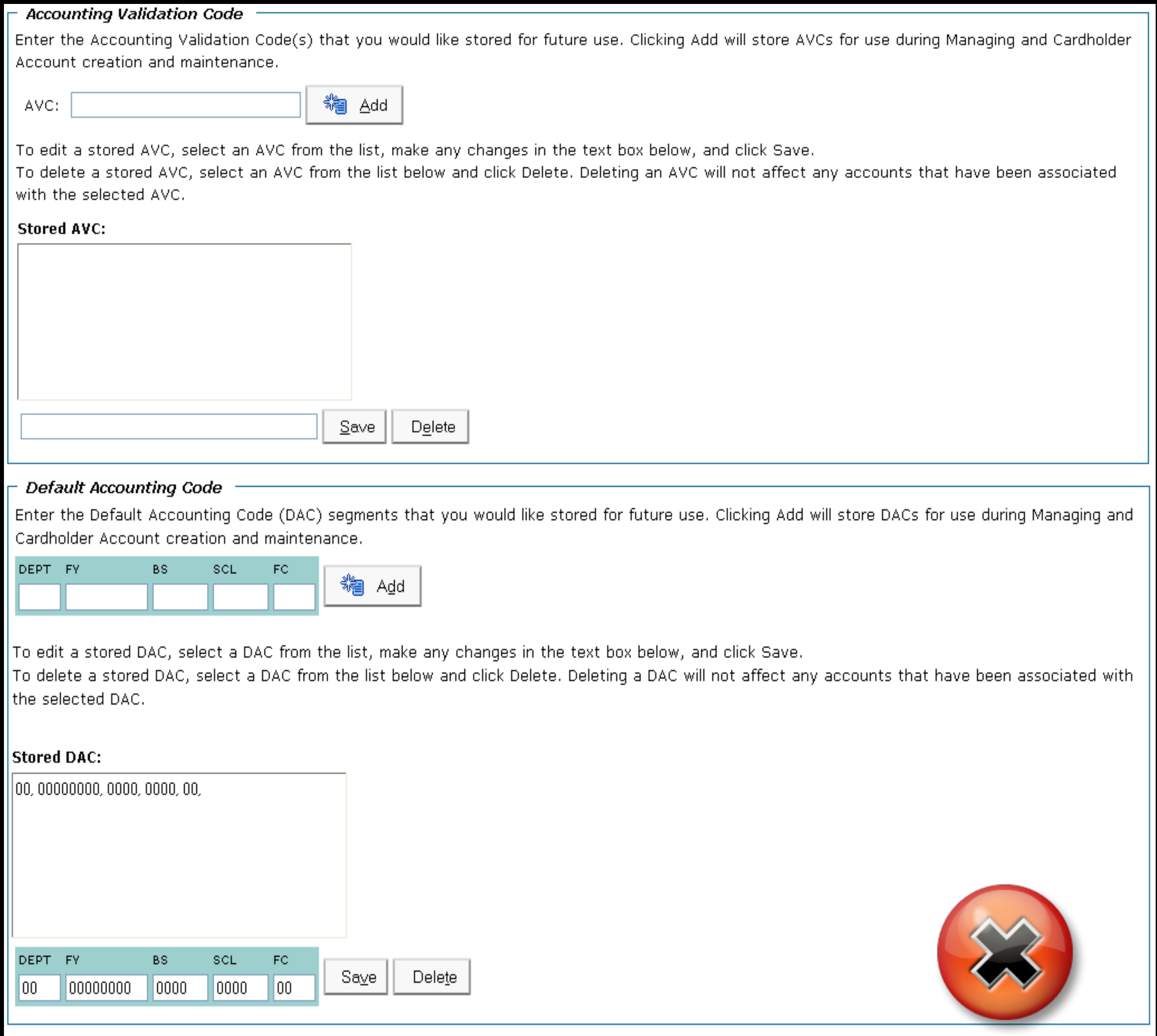
1. To store an Accounting Validation Code (AVC), in the “Accounting Validation Code” section:

a. Enter the appropriate AVC.

b. Click Add. The AVC will be displayed in the “Stored AVC” box below.

2. To store a Default Accounting Code (DAC), in the “Default Accounting Code” section:

a. Enter the appropriate DAC



Accounting Validation Code

Enter the Accounting Validation Code(s) that you would like stored for future use. Clicking Add will store AVCs for use during Managing and Cardholder Account creation and maintenance.

AVC:

To edit a stored AVC, select an AVC from the list, make any changes in the text box below, and click Save.
To delete a stored AVC, select an AVC from the list below and click Delete. Deleting an AVC will not affect any accounts that have been associated with the selected AVC.

Stored AVC:

Default Accounting Code

Enter the Default Accounting Code (DAC) segments that you would like stored for future use. Clicking Add will store DACs for use during Managing and Cardholder Account creation and maintenance.

DEPT	FY	BS	SCL	FC

To edit a stored DAC, select a DAC from the list, make any changes in the text box below, and click Save.
To delete a stored DAC, select a DAC from the list below and click Delete. Deleting a DAC will not affect any accounts that have been associated with the selected DAC.

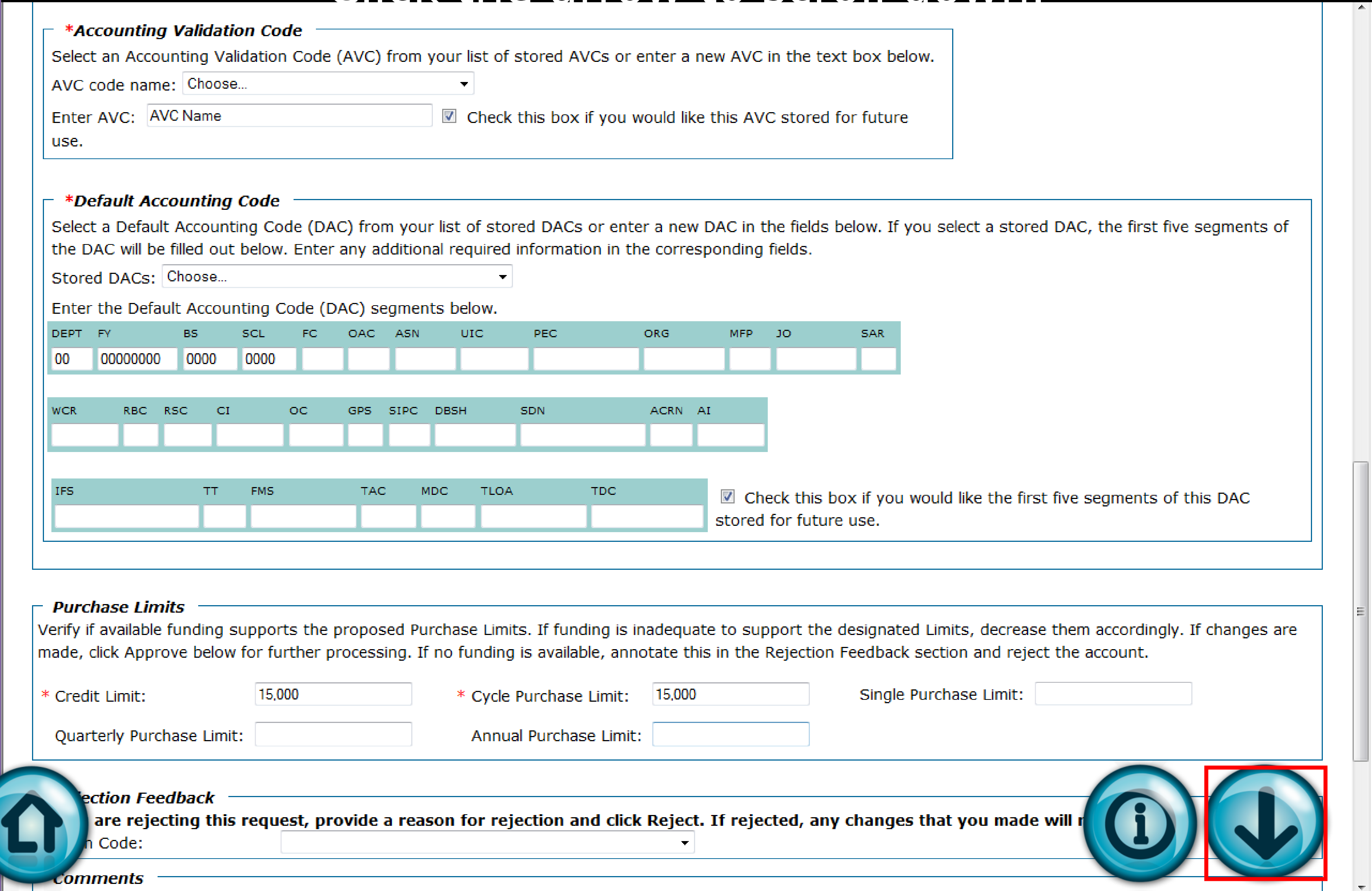
Stored DAC:

00, 00000000, 0000, 0000, 00,

DEPT	FY	BS	SCL	FC
00	00000000	0000	0000	00

Action 2 AIM: Approve the Financial Resources of the
Following MA

The **Purchase Limits** are a required field and have been entered by the A/OPC. If these fields are blank, the RM would be required to enter this information. Click the arrow to scroll down.



***Accounting Validation Code**

Select an Accounting Validation Code (AVC) from your list of stored AVCs or enter a new AVC in the text box below.

AVC code name: Choose...

Enter AVC: AVC Name ☑ Check this box if you would like this AVC stored for future use.

***Default Accounting Code**

Select a Default Accounting Code (DAC) from your list of stored DACs or enter a new DAC in the fields below. If you select a stored DAC, the first five segments of the DAC will be filled out below. Enter any additional required information in the corresponding fields.

Stored DACs: Choose...

Enter the Default Accounting Code (DAC) segments below.

DEPT	FY	BS	SCL	FC	OAC	ASN	UIC	PEC	ORG	MFP	JO	SAR
00	00000000	0000	0000									

WCR	RBC	RSC	CI	OC	GPS	SIPC	DBSH	SDN	ACRN	AI

IFS	TT	FMS	TAC	MDC	TLOA	TDC

☑ Check this box if you would like the first five segments of this DAC stored for future use.

Purchase Limits

Verify if available funding supports the proposed Purchase Limits. If funding is inadequate to support the designated Limits, decrease them accordingly. If changes are made, click Approve below for further processing. If no funding is available, annotate this in the Rejection Feedback section and reject the account.

* Credit Limit: 15,000
* Cycle Purchase Limit: 15,000
Single Purchase Limit:
Quarterly Purchase Limit:
Annual Purchase Limit:

ection Feedback

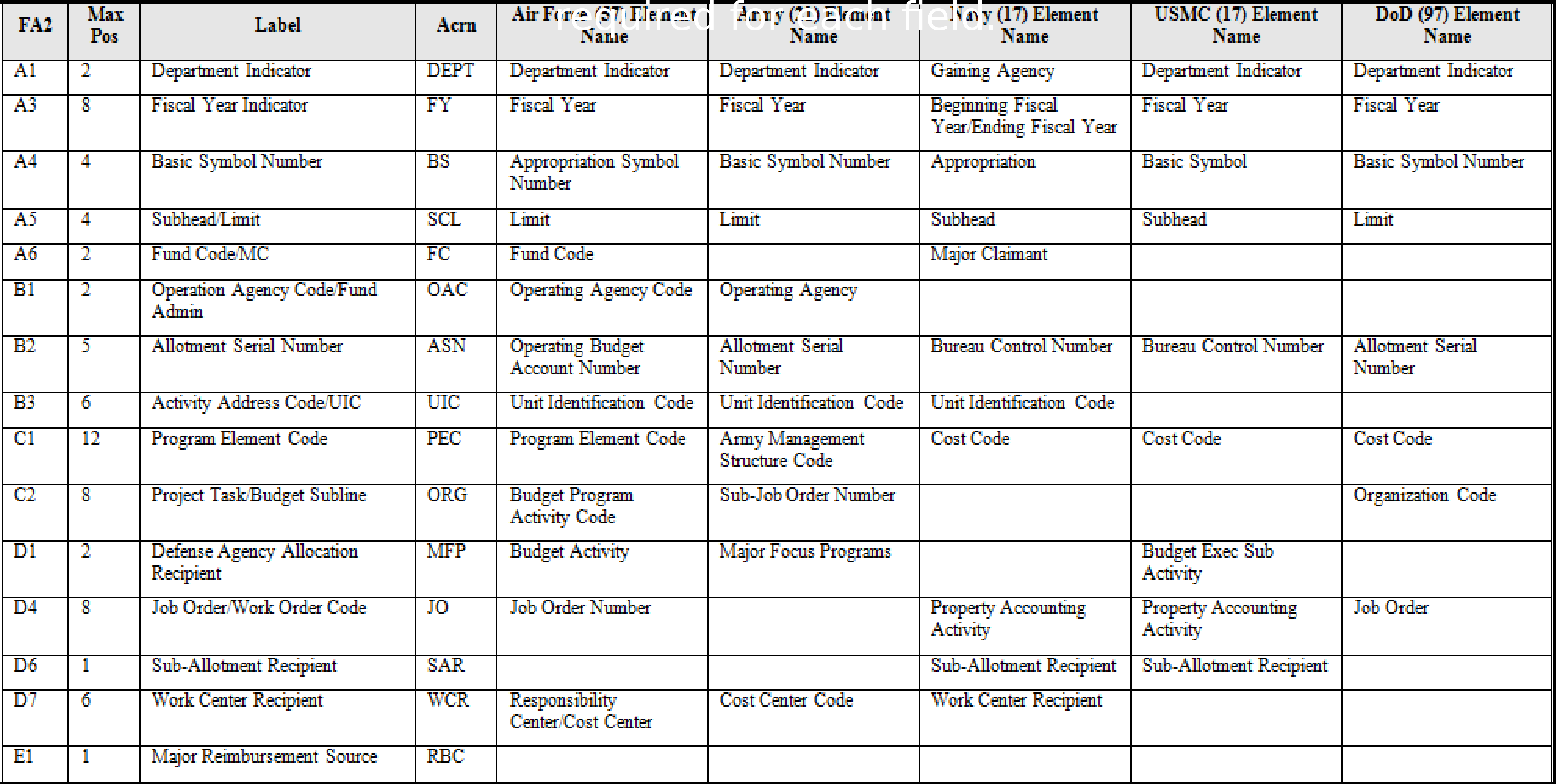
are rejecting this request, provide a reason for rejection and click Reject. If rejected, any changes that you made will r

n Code:

Comments

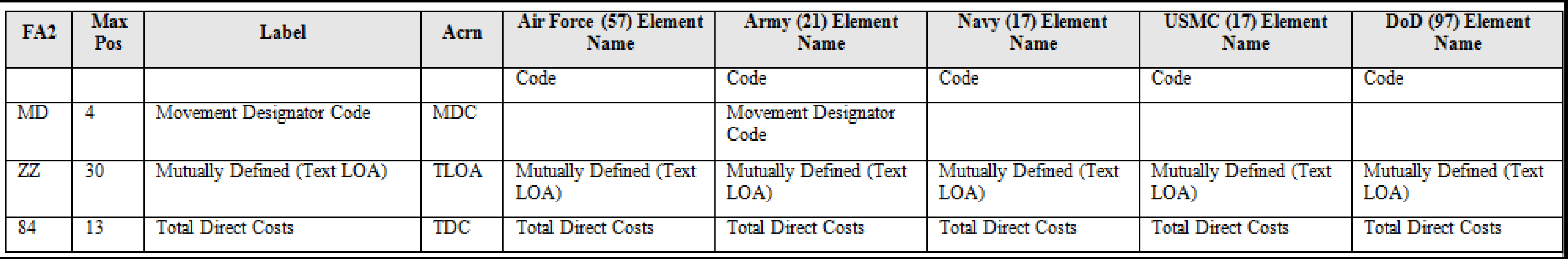
Lines of Accounting Field Definitions

The following table defines the accounting data title, the acronym used in AIM, and the corresponding acronyms used within the Services and Defense Agencies. In addition, the second column lists the number of characters required for each field.



FA2	Max Pos	Label	Acrn	Air Force (57) Element Name	Army (71) Element Name	Navy (17) Element Name	USMC (17) Element Name	DoD (97) Element Name
A1	2	Department Indicator	DEPT	Department Indicator	Department Indicator	Gaining Agency	Department Indicator	Department Indicator
A3	8	Fiscal Year Indicator	FY	Fiscal Year	Fiscal Year	Beginning Fiscal Year/Ending Fiscal Year	Fiscal Year	Fiscal Year
A4	4	Basic Symbol Number	BS	Appropriation Symbol Number	Basic Symbol Number	Appropriation	Basic Symbol	Basic Symbol Number
A5	4	Subhead/Limit	SCL	Limit	Limit	Subhead	Subhead	Limit
A6	2	Fund Code/MC	FC	Fund Code		Major Claimant		
B1	2	Operation Agency Code/Fund Admin	OAC	Operating Agency Code	Operating Agency			
B2	5	Allotment Serial Number	ASN	Operating Budget Account Number	Allotment Serial Number	Bureau Control Number	Bureau Control Number	Allotment Serial Number
B3	6	Activity Address Code/UIC	UIC	Unit Identification Code	Unit Identification Code	Unit Identification Code		
C1	12	Program Element Code	PEC	Program Element Code	Army Management Structure Code	Cost Code	Cost Code	Cost Code
C2	8	Project Task/Budget Subline	ORG	Budget Program Activity Code	Sub-Job Order Number			Organization Code
D1	2	Defense Agency Allocation Recipient	MFP	Budget Activity	Major Focus Programs		Budget Exec Sub Activity	
D4	8	Job Order/Work Order Code	JO	Job Order Number		Property Accounting Activity	Property Accounting Activity	Job Order
D6	1	Sub-Allotment Recipient	SAR			Sub-Allotment Recipient	Sub-Allotment Recipient	
D7	6	Work Center Recipient	WCR	Responsibility Center/Cost Center	Cost Center Code	Work Center Recipient		
E1	1	Major Reimbursement Source	RBC					

FA2	Max Pos	Label	Acrn	Air Force (57) Element Name	Army (21) Element Name	Navy (17) Element Name	USMC (17) Element Name	DoD (97) Element Name
		Code						
E2	3	Reimbursement Source Code	RSC	Accounts Receivable Source Code	Reimbursement Source Code			
E3	6	Customer Indicator/MPC	CI	Stock Record Account Number/Material Program Code	Customer Number			
F1	5	Object Class	OC	Element of Expense/Investment Code	Element of Resource	Object Class	Object Class	Object Class Code
F3	1	Government/Public Sector Identifier	GPS	Type Vendor (Type Van)	Obligation Data Code			Within/Outside Government
G2	2	Special Interest Code/Special Program Cost Code	SIPC	Emergency and Special Program Code				
I1	6	Abbreviated DoD Budget & Accounting Classification Code (BACC)	DBSH		Accounting Processing Code/Job Order Number			Accounting Processing Code
J1	15	Document/Record Reference Number	SDN	Commitment Number (usually from AF616)	Standard Document Number	Standard Document Number	Standard Document Number	Standard Document Number
K6	2	Accounting Classification Reference Number	ACRN		Accounting Classification Reference Number	Accounting Classification Reference Number	Accounting Classification Reference Number	
L1	6	Accounting Installation Number	AI	Accounting and Disbursing Station Number	Fiscal Station Number	Authorization Accounting Activity	Authorization Accounting Activity	Fiscal Station Number
M1	18	Local Installation data/IFS Number	IFS	Paying Office DoDAAC	IFS Number			
N1	3	Transaction Type	TT	Budget Authorization Account Number	Army Materiel Command Site	Transaction Type Code	Transaction Type Code	Army Materiel Command Site
P5	12	FMS Country Code, Implementing Agency, Case Number, and Line Number	FMS	FMS Country code, Implementing Agency, Case Number, and Line Item Number	FMS Country code, Implementing Agency, Case Number, and Line Item Number	FMS Country code, Implementing Agency, Case Number, and Line Item Number		
TA	4	Transportation Account Code	TAC	Transportation Account	Transportation Account	Transportation Account	Transportation Account	Transportation Account

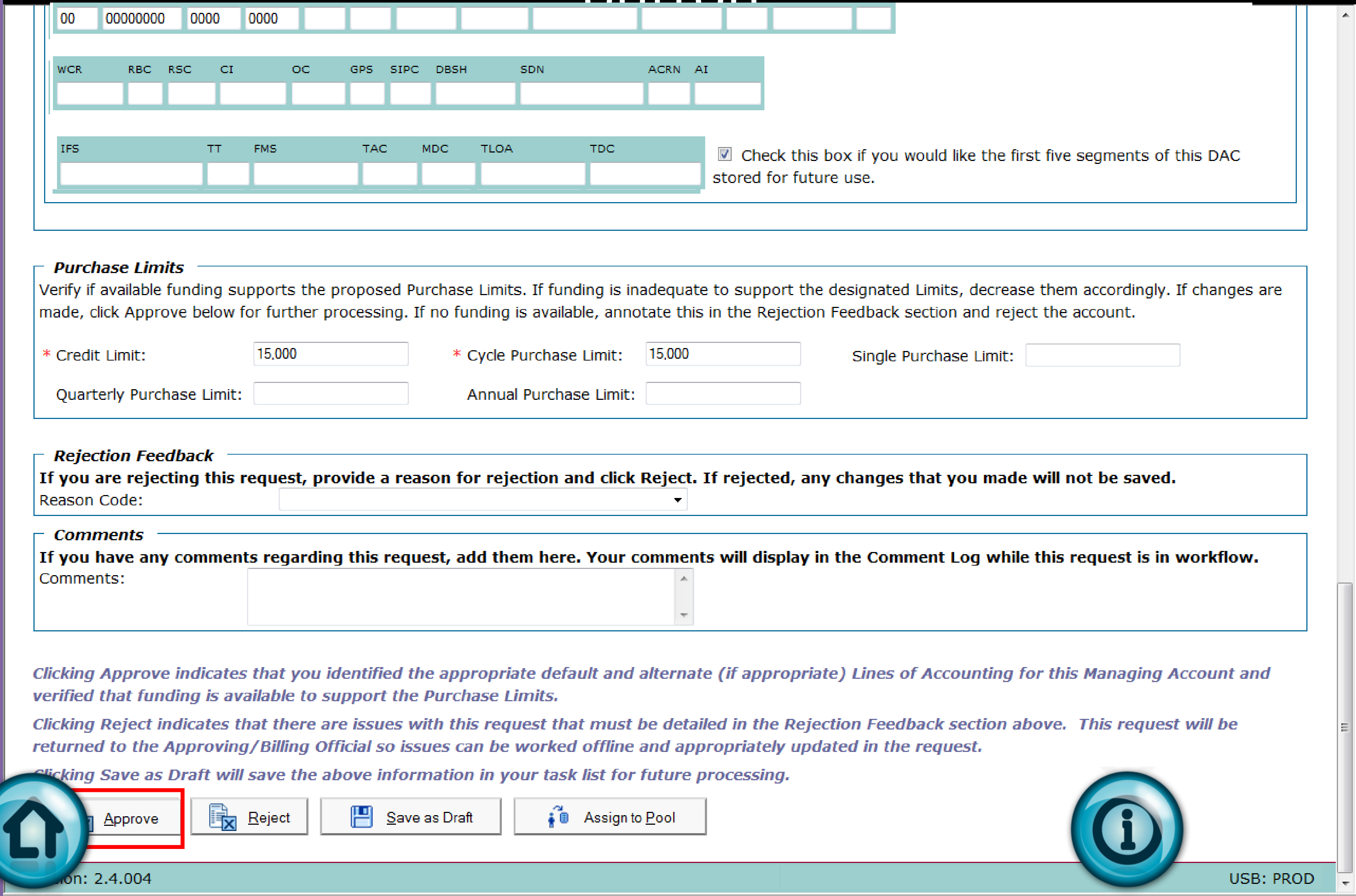


FA2	Max Pos	Label	Acrn	Air Force (57) Element Name	Army (21) Element Name	Navy (17) Element Name	USMC (17) Element Name	DoD (97) Element Name
				Code	Code	Code	Code	Code
MD	4	Movement Designator Code	MDC		Movement Designator Code			
ZZ	30	Mutually Defined (Text LOA)	TLOA	Mutually Defined (Text LOA)	Mutually Defined (Text LOA)	Mutually Defined (Text LOA)	Mutually Defined (Text LOA)	Mutually Defined (Text LOA)
84	13	Total Direct Costs	TDC	Total Direct Costs	Total Direct Costs	Total Direct Costs	Total Direct Costs	Total Direct Costs

Note: Lines of Accounting Field Definitions can also be located in Appendix E of the AIM User Manual.

Action 2 AIM: Approve the Financial Resources of the Following MA

The RM has confirmed that all financial information is correct. Click the "Approve" button



00	00000000	0000	0000									

WCR	RBC	RSC	CI	OC	GPS	SIPC	DBSH	SDN	ACRN	AI

IFS	TT	FMS	TAC	MDC	TLOA	TDC

☑ Check this box if you would like the first five segments of this DAC stored for future use.

Purchase Limits

Verify if available funding supports the proposed Purchase Limits. If funding is inadequate to support the designated Limits, decrease them accordingly. If changes are made, click Approve below for further processing. If no funding is available, annotate this in the Rejection Feedback section and reject the account.

* Credit Limit: 15,000

* Cycle Purchase Limit: 15,000

Single Purchase Limit:

Quarterly Purchase Limit:

Annual Purchase Limit:

Rejection Feedback

If you are rejecting this request, provide a reason for rejection and click Reject. If rejected, any changes that you made will not be saved.

Reason Code:

Comments

If you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in workflow.

Comments:

Clicking Approve indicates that you identified the appropriate default and alternate (if appropriate) Lines of Accounting for this Managing Account and verified that funding is available to support the Purchase Limits.

Clicking Reject indicates that there are issues with this request that must be detailed in the Rejection Feedback section above. This request will be returned to the Approving/Billing Official so issues can be worked offline and appropriately updated in the request.

Clicking Save as Draft will save the above information in your task list for future processing.

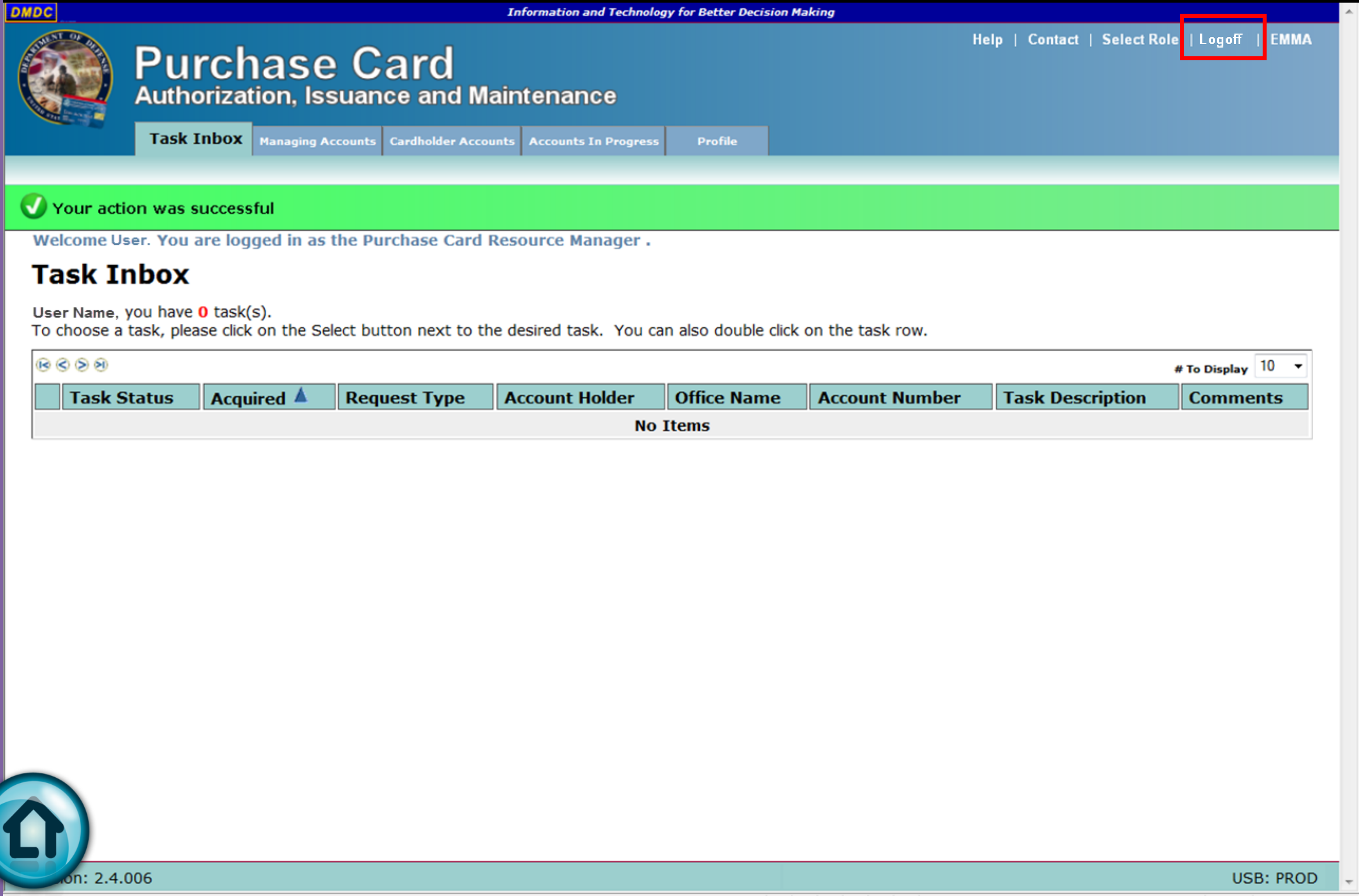
Note: If you choose to reject the Managing Account, you must choose a **Reason Code** from the drop-down box. If you have any additional comments, you can enter them in the text box. Click **Reject**.

You have the option to **Save as Draft** and return to finish entering information.

You also have the option to **Assign to Pool**, if you would like other members of the RM Pool to have access to this Managing Account. Assigning the account to the RM Pool will allow other members of the pool to act, not only on the Managing Account, but all Cardholder Accounts created beneath it.

Tip: To check the status of an account request, click the **Accounts in Progress** tab.

Your action was successful. Click the "Logoff" link.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile

✓ Your action was successful

Welcome User. You are logged in as the Purchase Card Resource Manager .

Task Inbox

User Name, you have 0 task(s).
To choose a task, please click on the Select button next to the desired task. You can also double click on the task row.

To Display 10

	Task Status	Acquired	Request Type	Account Holder	Office Name	Account Number	Task Description	Comments
				No Items				

ion: 2.4.006 USB: PROD

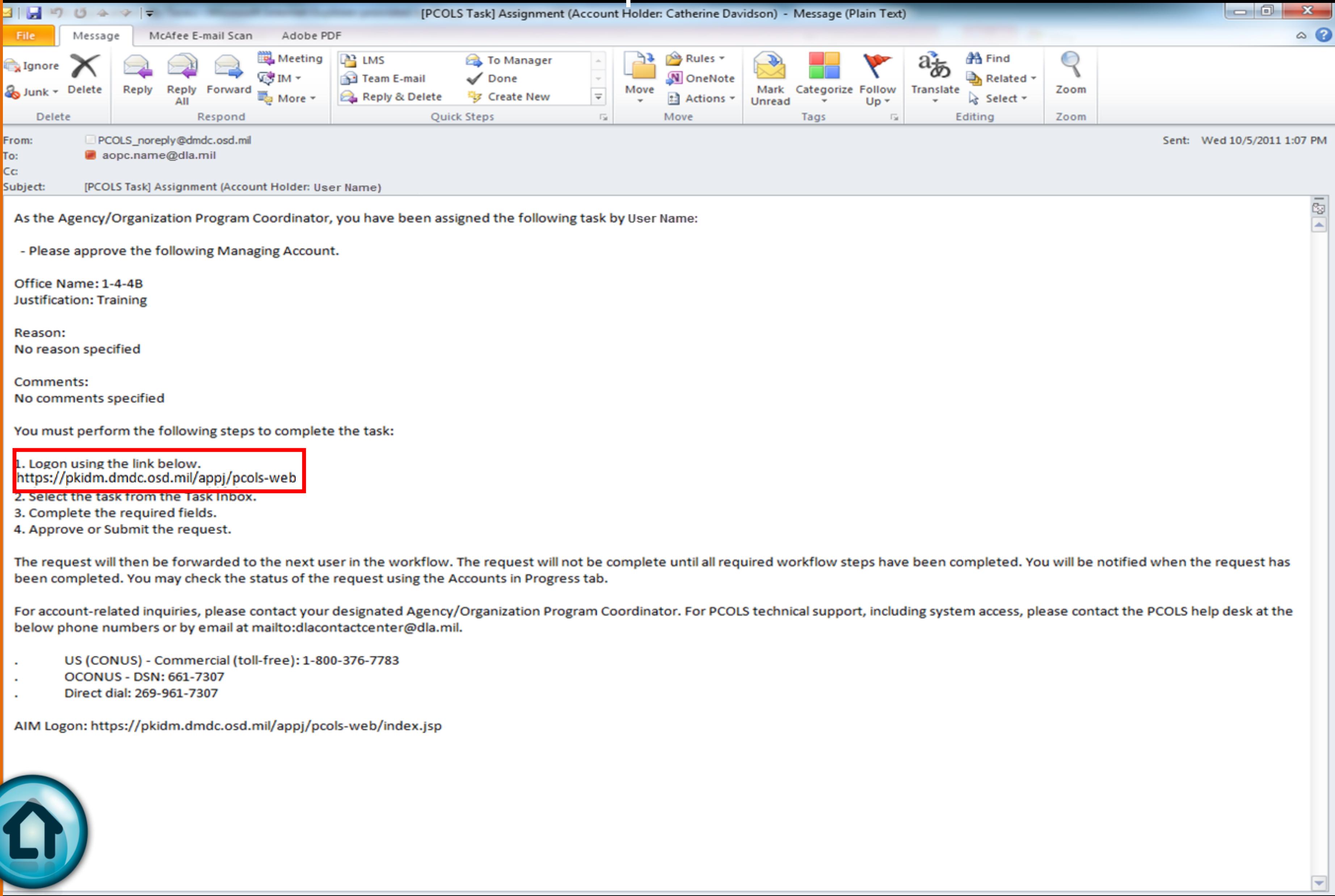
RM Action 2
Complete

A/OPC Action 2

AIM: Approve Managing Account

A/OPC Action 2 AIM: Approve Managing Account

The A/OPC has received a new PCOLS Task email to "approve the following managing account." Click on the link to complete the task.


[PCOLS Task] Assignment (Account Holder: Catherine Davidson) - Message (Plain Text)
File
Message
McAfee E-mail Scan
Adobe PDF
Ignore
Junk
Delete
Delete
Reply
Reply All
Forward
Meeting
IM
More
Respond
LMS
Team E-mail
Reply & Delete
To Manager
Done
Create New
Quick Steps
Move
Rules
OneNote
Actions
Move
Mark Unread
Categorize
Follow Up
Tags
Translate
Find
Related
Select
Editing
Zoom
Zoom

From: PCOLS_noreply@dmdc.osd.mil
To: aopc.name@dla.mil
Cc:
Subject: [PCOLS Task] Assignment (Account Holder: User Name)

Sent: Wed 10/5/2011 1:07 PM

As the Agency/Organization Program Coordinator, you have been assigned the following task by User Name:

- Please approve the following Managing Account.

Office Name: 1-4-4B
Justification: Training

Reason:
No reason specified

Comments:
No comments specified

You must perform the following steps to complete the task:

1. Logon using the link below.
https://pkidm.dmdc.osd.mil/appj/pcols-web
2. Select the task from the Task Inbox.
3. Complete the required fields.
4. Approve or Submit the request.

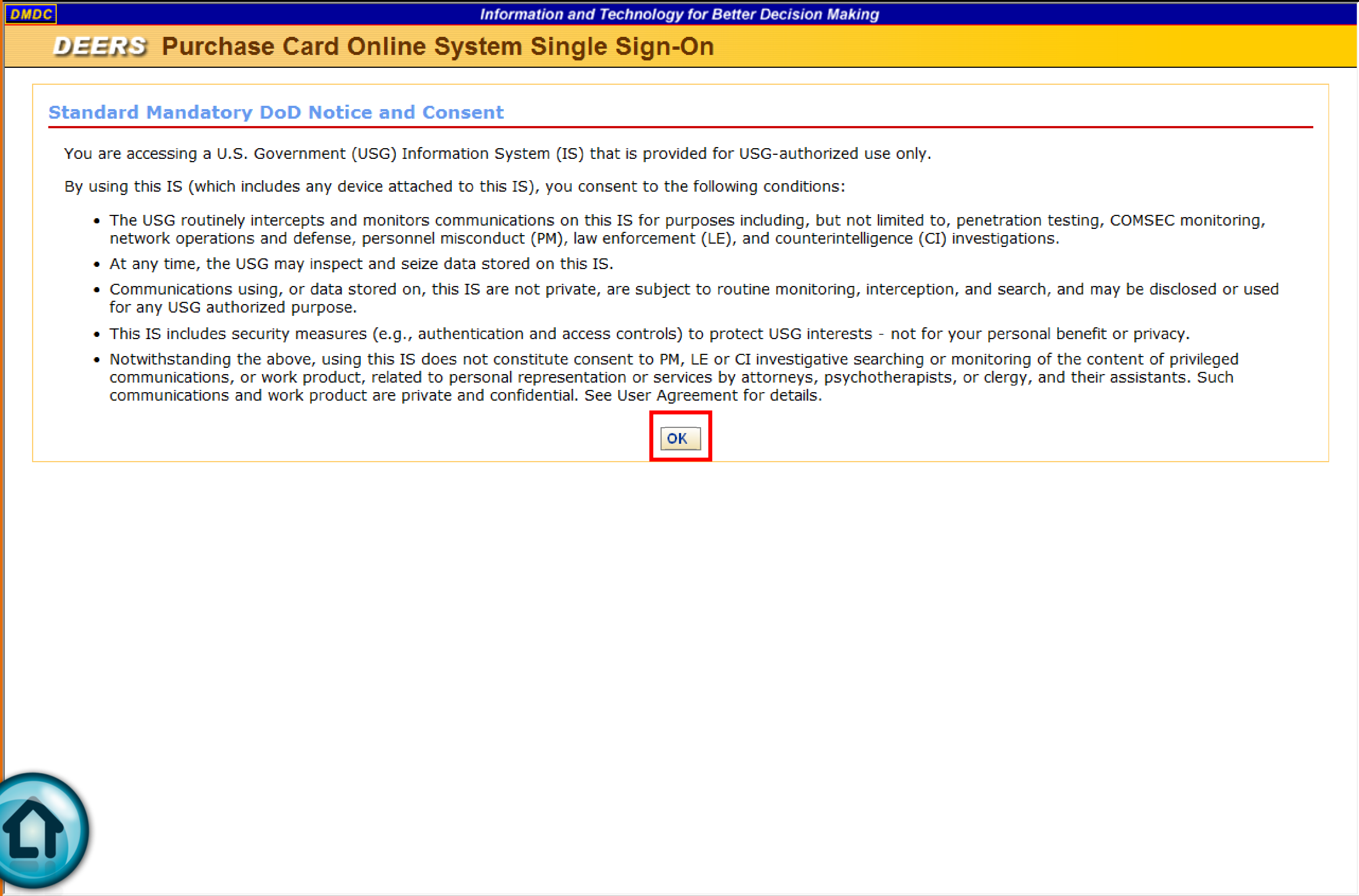
The request will then be forwarded to the next user in the workflow. The request will not be complete until all required workflow steps have been completed. You will be notified when the request has been completed. You may check the status of the request using the Accounts in Progress tab.

For account-related inquiries, please contact your designated Agency/Organization Program Coordinator. For PCOLS technical support, including system access, please contact the PCOLS help desk at the below phone numbers or by email at mailto:dlacontactcenter@dla.mil.

- US (CONUS) - Commercial (toll-free): 1-800-376-7783
- OCONUS - DSN: 661-7307
- Direct dial: 269-961-7307

AIM Logon: https://pkidm.dmdc.osd.mil/appj/pcols-web/index.jsp

Click the “OK” button.


DMDC
Information and Technology for Better Decision Making
DEERS Purchase Card Online System Single Sign-On

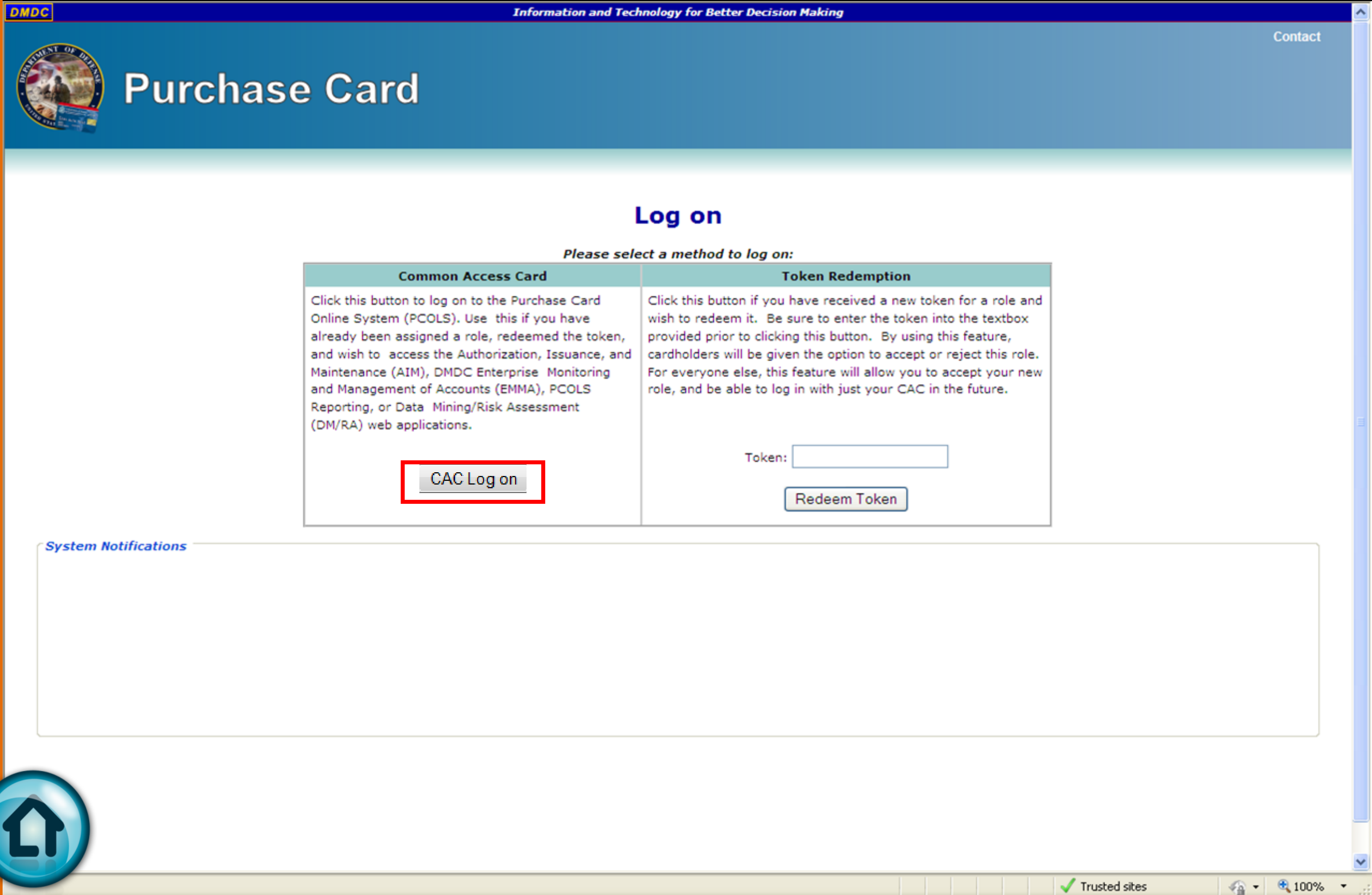
Standard Mandatory DoD Notice and Consent

You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only.

By using this IS (which includes any device attached to this IS), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests - not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential. See User Agreement for details.

Click the “CAC Log on” button.



DMDC
Information and Technology for Better Decision Making
Contact
Purchase Card

Log on

Please select a method to log on:

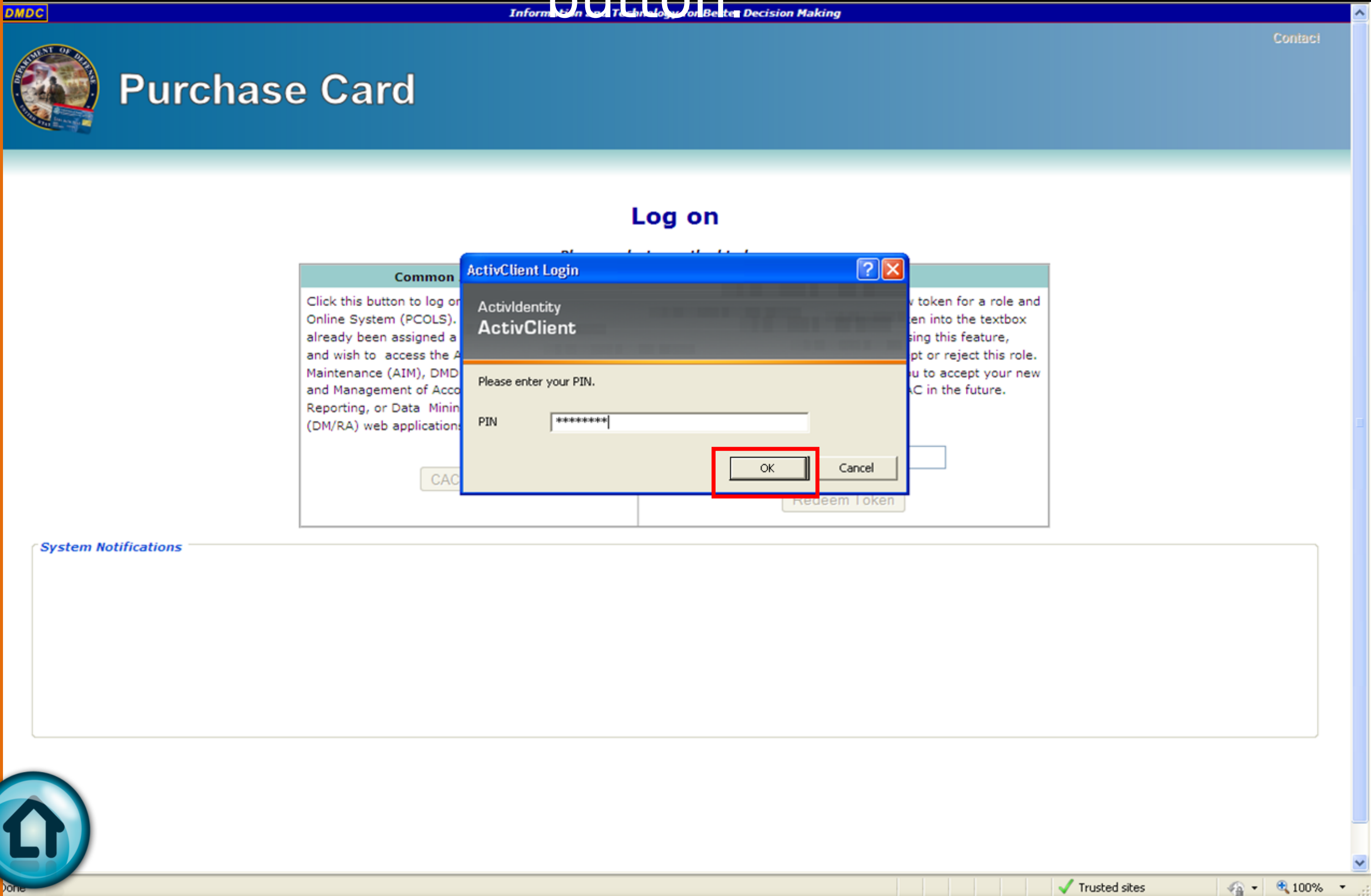
Common Access Card	Token Redemption
Click this button to log on to the Purchase Card Online System (PCOLS). Use this if you have already been assigned a role, redeemed the token, and wish to access the Authorization, Issuance, and Maintenance (AIM), DMDC Enterprise Monitoring and Management of Accounts (EMMA), PCOLS Reporting, or Data Mining/Risk Assessment (DM/RA) web applications. CAC Log on	Click this button if you have received a new token for a role and wish to redeem it. Be sure to enter the token into the textbox provided prior to clicking this button. By using this feature, cardholders will be given the option to accept or reject this role. For everyone else, this feature will allow you to accept your new role, and be able to log in with just your CAC in the future. Token: Redeem Token

System Notifications

Trusted sites
100%

A/OPC Action 2 AIM: Approve Managing Account

The A/OPC has entered their PIN. Click the “OK” button


DMDC
Information and Technology for Better Decision Making
Contact
Purchase Card

Log on

Common

Click this button to log o
Online System (PCOLS).
already been assigned a
and wish to access the A
Maintenance (AIM), DMD
and Management of Acco
Reporting, or Data Minin
(DM/RA) web application

token for a role and
en into the textbox
ing this feature,
pt or reject this role.
u to accept your new
AC in the future.

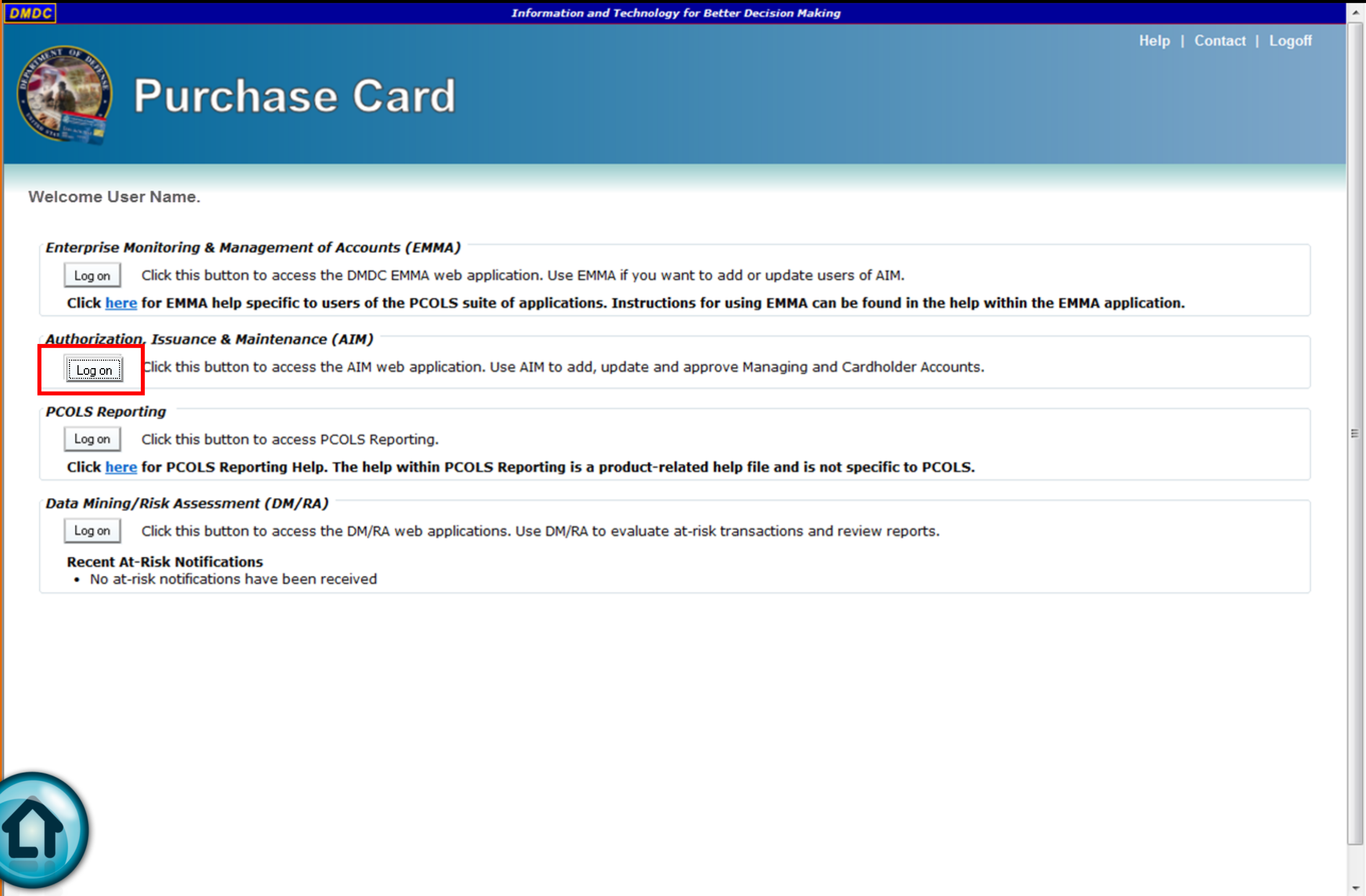
CAC
Redeem Token
ActivClient Login
ActivIdentity
ActivClient

Please enter your PIN.

PIN *********

OK
Cancel
System Notifications
Done
Trusted sites
100%

Click on the “Log on” button for Authorization, Issuance & Maintenance (AIM).



Welcome User Name.

Enterprise Monitoring & Management of Accounts (EMMA)

Log on Click this button to access the DMDC EMMA web application. Use EMMA if you want to add or update users of AIM.

Click here for EMMA help specific to users of the PCOLS suite of applications. Instructions for using EMMA can be found in the help within the EMMA application.

Authorization, Issuance & Maintenance (AIM)

Log on Click this button to access the AIM web application. Use AIM to add, update and approve Managing and Cardholder Accounts.

PCOLS Reporting

Log on Click this button to access PCOLS Reporting.

Click here for PCOLS Reporting Help. The help within PCOLS Reporting is a product-related help file and is not specific to PCOLS.

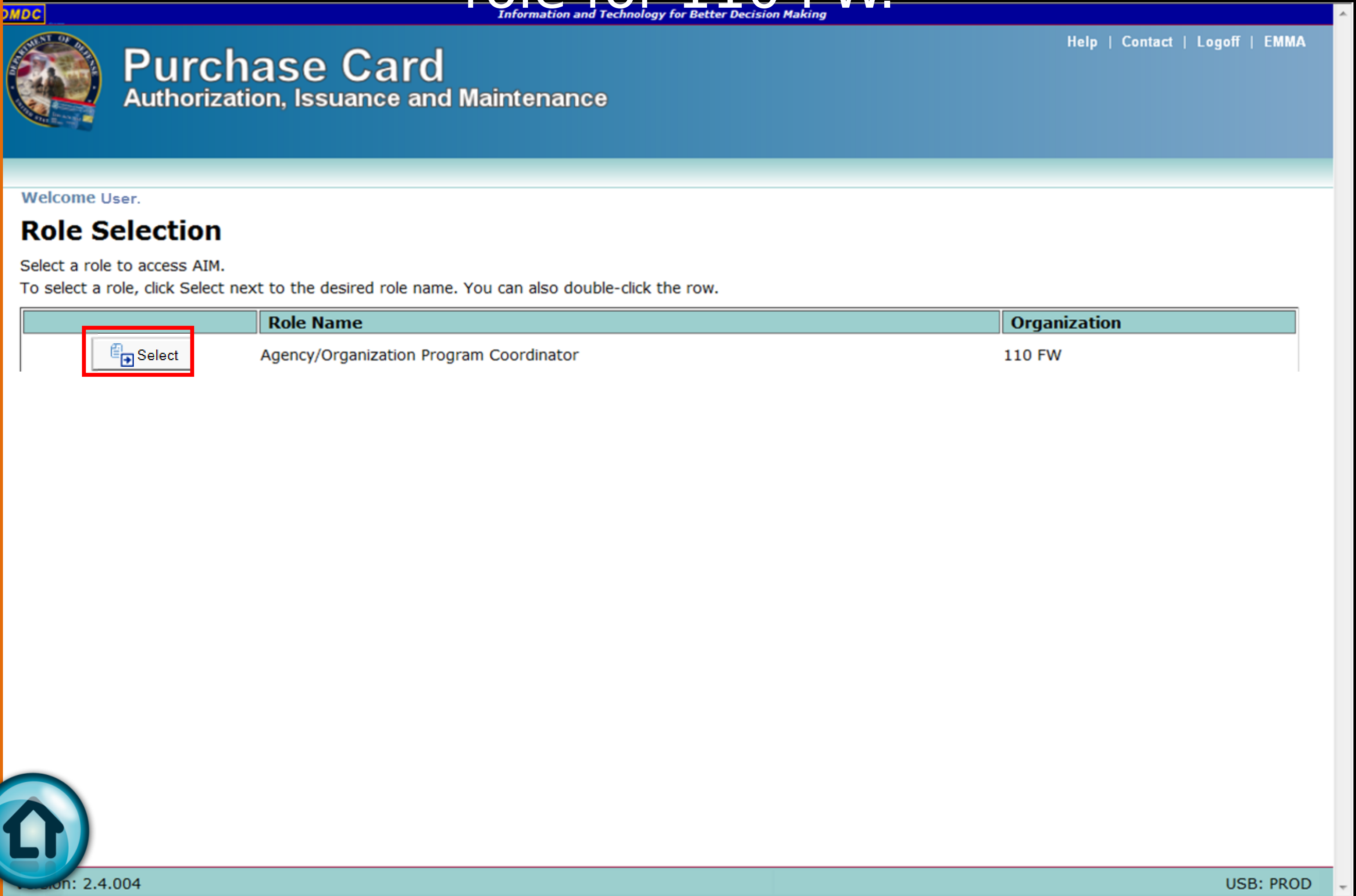
Data Mining/Risk Assessment (DM/RA)

Log on Click this button to access the DM/RA web applications. Use DM/RA to evaluate at-risk transactions and review reports.

Recent At-Risk Notifications

- No at-risk notifications have been received

Click on the “Select” button for the **Agency/Organization Program Coordinator** role for 110 FW.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Select
ion: 2.4.004
USB: PROD

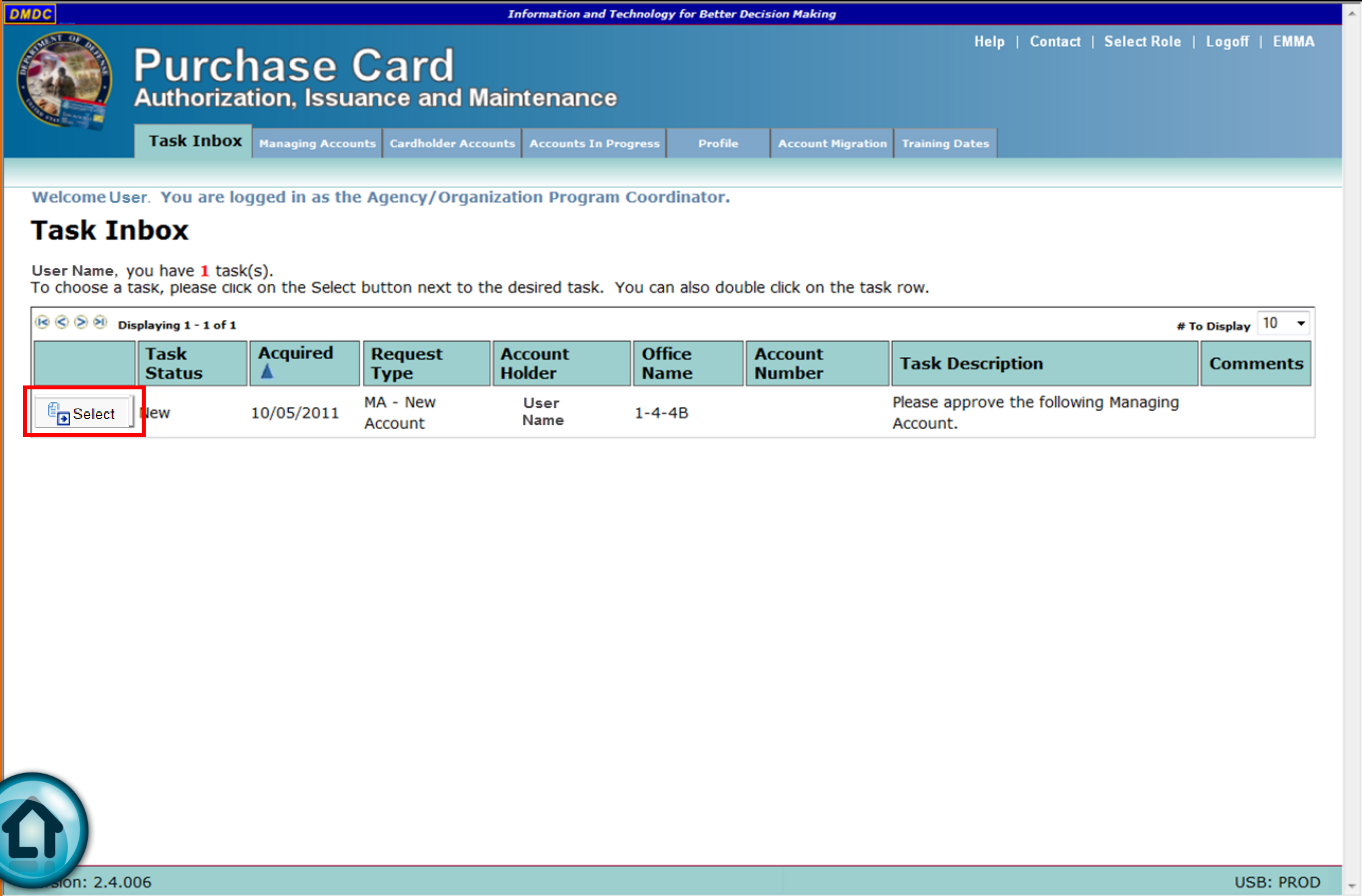
Welcome User.

Role Selection

Select a role to access AIM.
To select a role, click Select next to the desired role name. You can also double-click the row.

	Role Name	Organization
Select	Agency/Organization Program Coordinator	110 FW

Click on the “Select” button to view the new task.



DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile
Account Migration
Training Dates

Welcome User. You are logged in as the Agency/Organization Program Coordinator.

Task Inbox

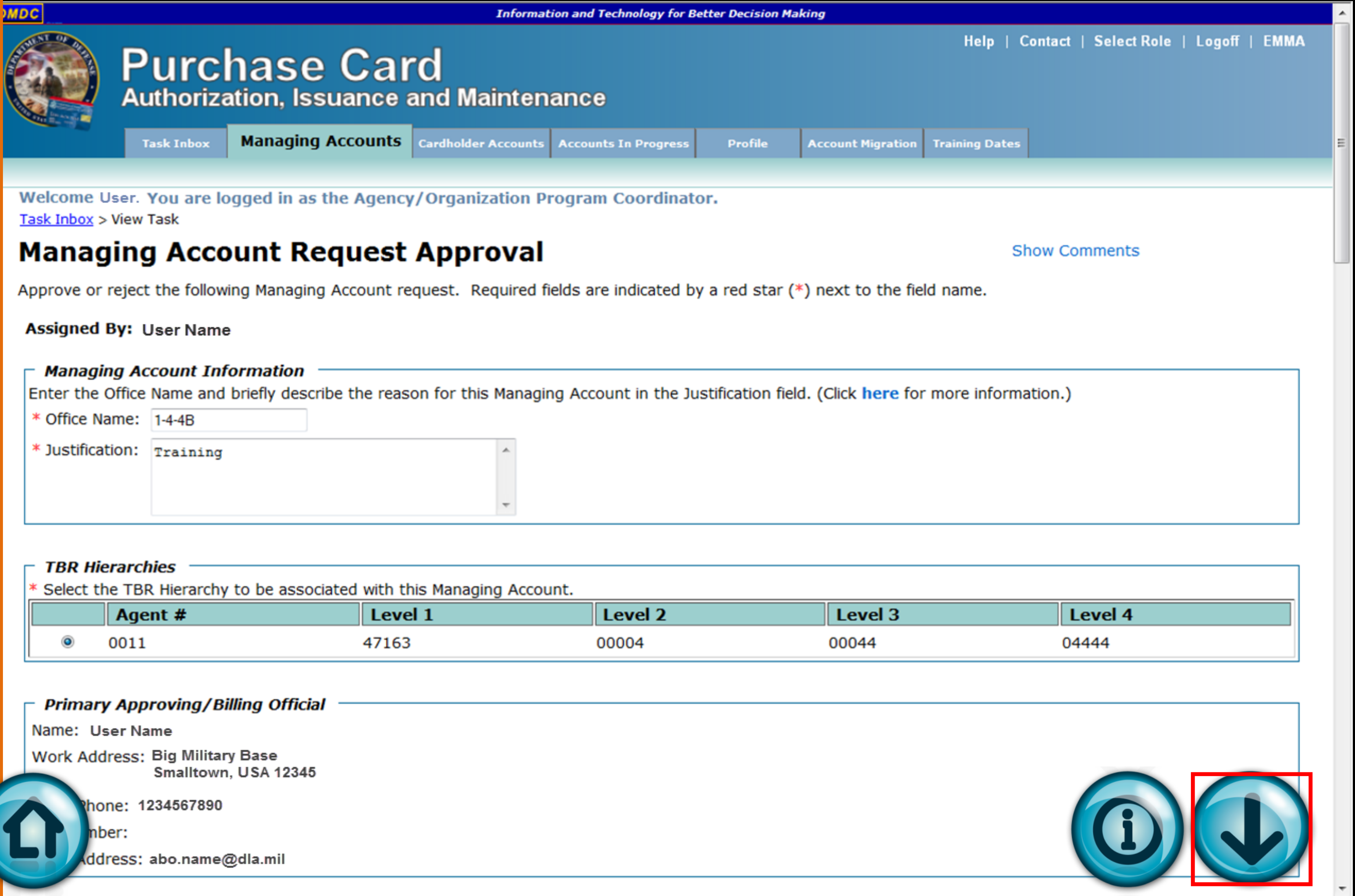
User Name, you have 1 task(s).
To choose a task, please click on the Select button next to the desired task. You can also double click on the task row.

Displaying 1 - 1 of 1 # To Display 10

	Task Status	Acquired	Request Type	Account Holder	Office Name	Account Number	Task Description	Comments
Select	New	10/05/2011	MA - New Account	User Name	1-4-4B		Please approve the following Managing Account.	

A/OPC Action 2 AIM: Approve Managing Account

A/OPC has verified that the information is correct. Click the arrow to scroll down.


DMDC
Information and Technology for Better Decision Making
Help | Contact | Select Role | Logoff | EMMA
Purchase Card
Authorization, Issuance and Maintenance
Task Inbox
Managing Accounts
Cardholder Accounts
Accounts In Progress
Profile
Account Migration
Training Dates

Welcome User. You are logged in as the Agency/Organization Program Coordinator.

Task Inbox > View Task

Managing Account Request Approval

Show Comments

Approve or reject the following Managing Account request. Required fields are indicated by a red star (*) next to the field name.

Assigned By: User Name

Managing Account Information

Enter the Office Name and briefly describe the reason for this Managing Account in the Justification field. (Click here for more information.)

* Office Name: 1-4-4B

* Justification: Training

TBR Hierarchies

* Select the TBR Hierarchy to be associated with this Managing Account.

	Agent #	Level 1	Level 2	Level 3	Level 4
●	0011	47163	00004	00044	04444

Primary Approving/Billing Official

Name: User Name

Work Address: Big Military Base
Smalltown, USA 12345

hone: 1234567890

mber:

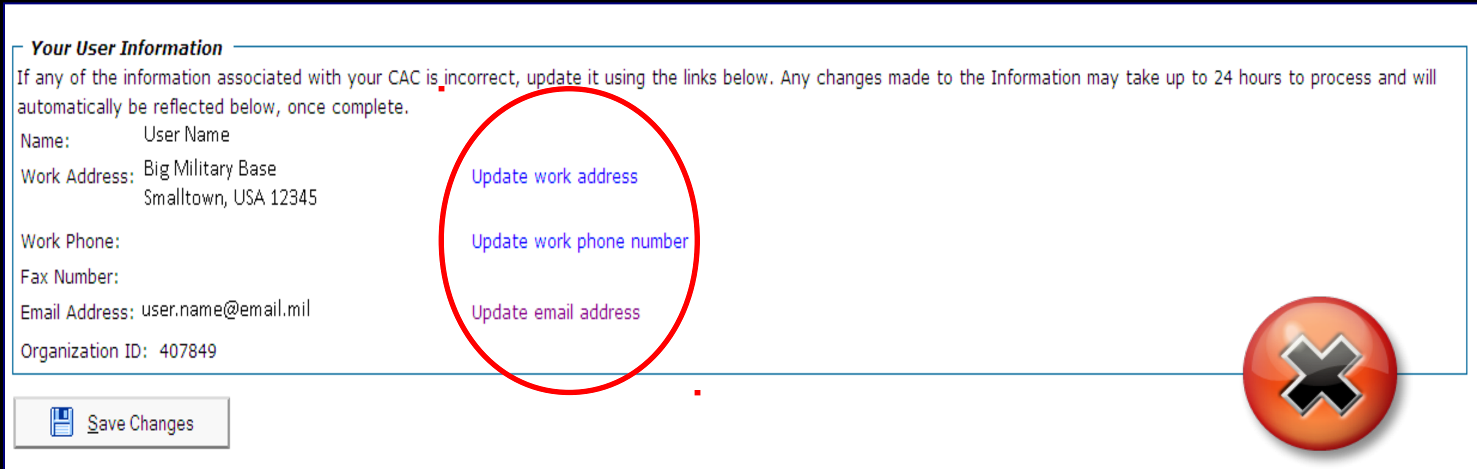
ddress: abo.name@dla.mil

WARNING: A/BOs are required to have a work address to process accounts.

If the A/BO's address is missing they can click on their "Profile" tab in AIM see what information is displayed. Changes can be made by clicking on the update links. Any changes that are made could take up to 24 hours to be reflected in your AIM profile. The A/BO can verify if the information has changed by logging back into AIM and clicking on the Profile tab.

Updates to a **work address** or **phone number** can be done in **DEERS:** **https://dmdc.osd.mil/appj/address/**

Updates to an **email address** can be done in **UMP:** **https://www.dmdc.ord.mil/ump**



Your User Information

If any of the information associated with your CAC is incorrect, update it using the links below. Any changes made to the Information may take up to 24 hours to process and will automatically be reflected below, once complete.

Name: User Name

Work Address: Big Military Base
Smalltown, USA 12345

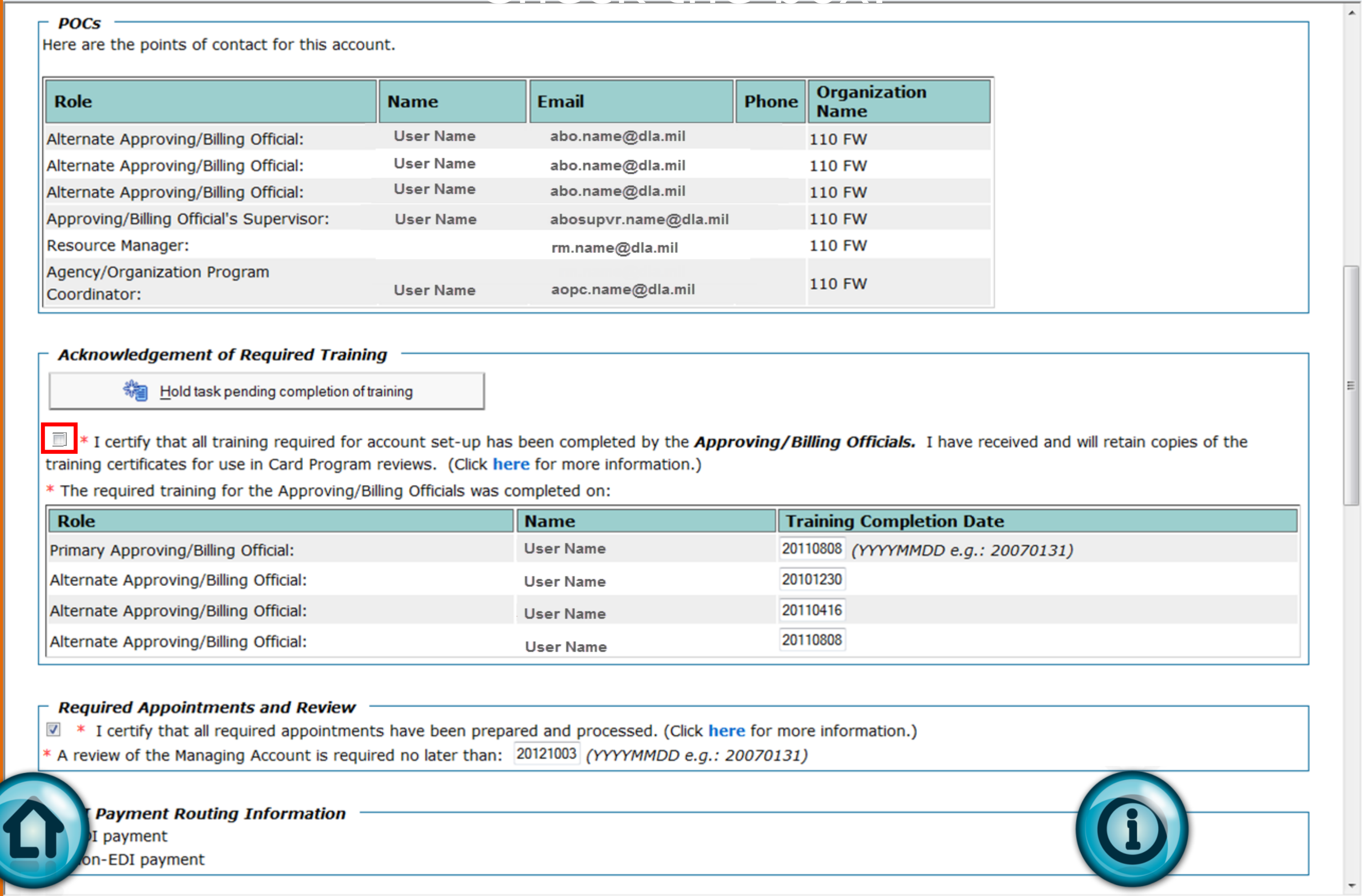
Work Phone:

Fax Number:

Email Address: user.name@email.mil

Organization ID: 407849

The A/OPC has certified that all required training for the A/BOs has been completed. Check the box.



POCs

Here are the points of contact for this account.

Role	Name	Email	Phone	Organization Name
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Approving/Billing Official's Supervisor:	User Name	abosupvr.name@dla.mil		110 FW
Resource Manager:		rm.name@dla.mil		110 FW
Agency/Organization Program Coordinator:	User Name	aopc.name@dla.mil		110 FW

Acknowledgement of Required Training

Hold task pending completion of training

☐ * I certify that all training required for account set-up has been completed by the ***Approving/Billing Officials.*** I have received and will retain copies of the training certificates for use in Card Program reviews. (Click here for more information.)

* The required training for the Approving/Billing Officials was completed on:

Role	Name	Training Completion Date
Primary Approving/Billing Official:	User Name	20110808 *(YYYYMMDD e.g.: 20070131)*
Alternate Approving/Billing Official:	User Name	20101230
Alternate Approving/Billing Official:	User Name	20110416
Alternate Approving/Billing Official:	User Name	20110808

Required Appointments and Review

☑ * I certify that all required appointments have been prepared and processed. (Click here for more information.)

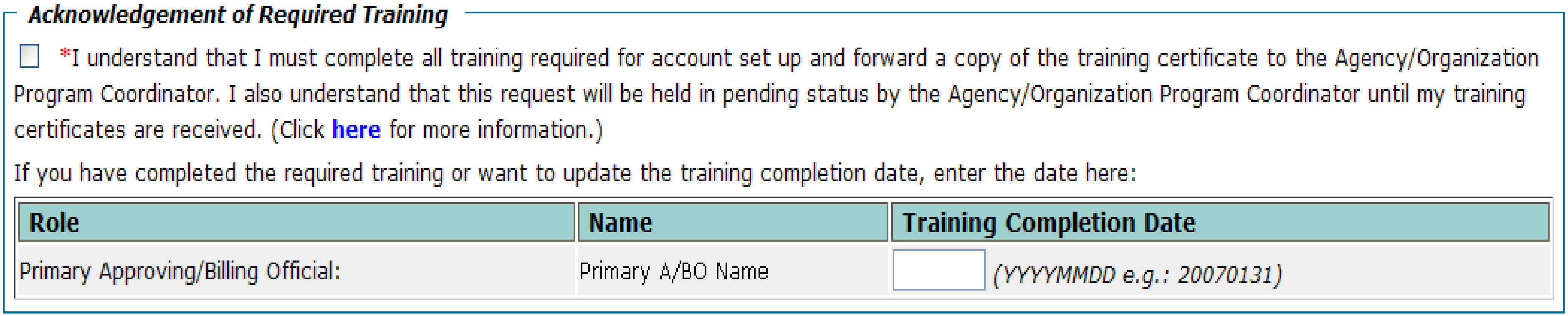
* A review of the Managing Account is required no later than: 20121003 *(YYYYMMDD e.g.: 20070131)*

Payment Routing Information

I payment

on-EDI payment

Note: The training date will be pre-populated for any subsequent accounts with which the A/BOs are associated. In the future, the A/BOs will receive an email 60 and 30 days prior to the date that the refresher training is due. Once the training has been completed and the A/BOs have submitted the training certificate to the A/OPC, the A/OPC will update the completion date in AIM. On the training expiration date, the A/BO will receive an email stating that their training is expired and past due.



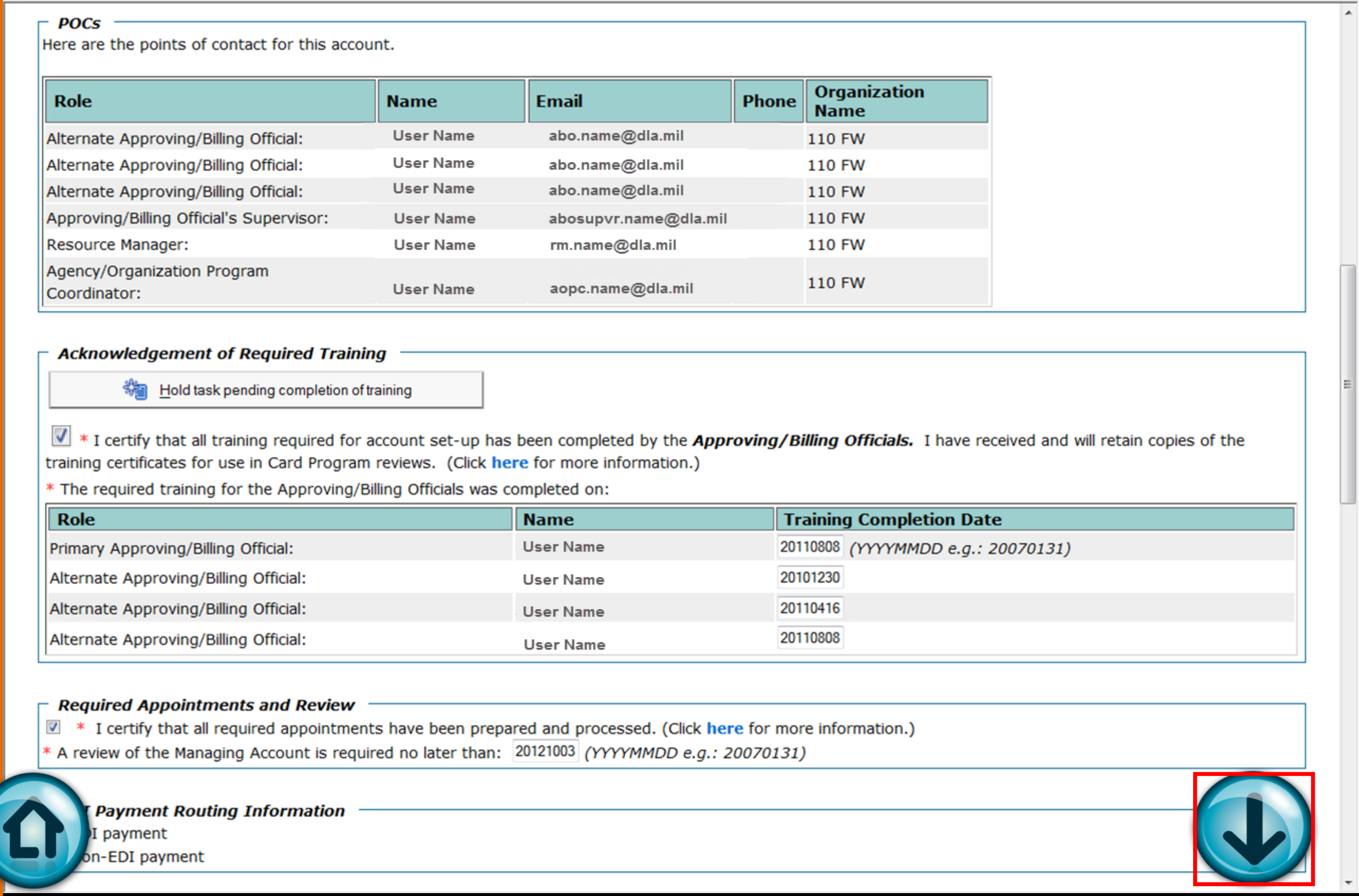
Acknowledgement of Required Training

☐ *I understand that I must complete all training required for account set up and forward a copy of the training certificate to the Agency/Organization Program Coordinator. I also understand that this request will be held in pending status by the Agency/Organization Program Coordinator until my training certificates are received. (Click **here** for more information.)

If you have completed the required training or want to update the training completion date, enter the date here:

Role	**Name**	**Training Completion Date**
Primary Approving/Billing Official:	Primary A/BO Name	☐ *(YYYYMMDD e.g.: 20070131)*

Click the arrow to scroll down.



POCs

Here are the points of contact for this account.

Role	Name	Email	Phone	Organization Name
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Alternate Approving/Billing Official:	User Name	abo.name@dla.mil		110 FW
Approving/Billing Official's Supervisor:	User Name	abosupvr.name@dla.mil		110 FW
Resource Manager:	User Name	rm.name@dla.mil		110 FW
Agency/Organization Program Coordinator:	User Name	aopc.name@dla.mil		110 FW

Acknowledgement of Required Training

☑ * I certify that all training required for account set-up has been completed by the ***Approving/Billing Officials.*** I have received and will retain copies of the training certificates for use in Card Program reviews. (Click here for more information.)

* The required training for the Approving/Billing Officials was completed on:

Role	Name	Training Completion Date
Primary Approving/Billing Official:	User Name	20110808 *(YYYYMMDD e.g.: 20070131)*
Alternate Approving/Billing Official:	User Name	20101230
Alternate Approving/Billing Official:	User Name	20110416
Alternate Approving/Billing Official:	User Name	20110808

Required Appointments and Review

☑ * I certify that all required appointments have been prepared and processed. (Click here for more information.)

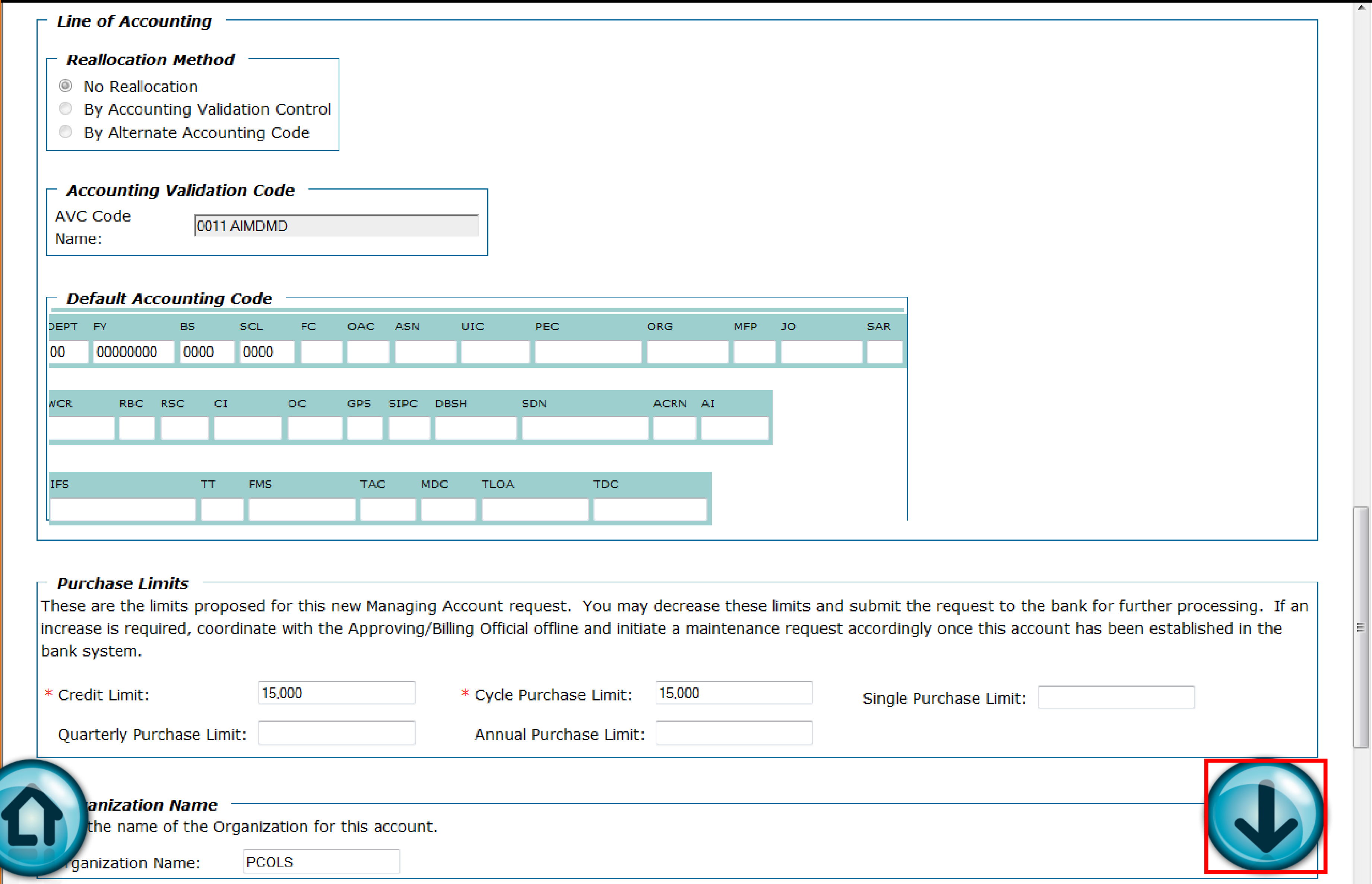
* A review of the Managing Account is required no later than: 20121003 *(YYYYMMDD e.g.: 20070131)*

T Payment Routing Information

I payment

on-EDI payment

All financial information has been entered by the RM. Click the arrow to scroll down.



Line of Accounting

Reallocation Method

● No Reallocation
○ By Accounting Validation Control
○ By Alternate Accounting Code

Accounting Validation Code

AVC Code Name: 0011 AIMDMD

Default Accounting Code

DEPT	FY	BS	SCL	FC	OAC	ASN	UIC	PEC	ORG	MFP	JO	SAR
00	00000000	0000	0000									

WCR	RBC	RSC	CI	OC	GPS	SIPC	DBSH	SDN	ACRN	AI

IFS	TT	FMS	TAC	MDC	TLOA	TDC

Purchase Limits

These are the limits proposed for this new Managing Account request. You may decrease these limits and submit the request to the bank for further processing. If an increase is required, coordinate with the Approving/Billing Official offline and initiate a maintenance request accordingly once this account has been established in the bank system.

* Credit Limit: 15,000
* Cycle Purchase Limit: 15,000
Single Purchase Limit:
Quarterly Purchase Limit:
Annual Purchase Limit:

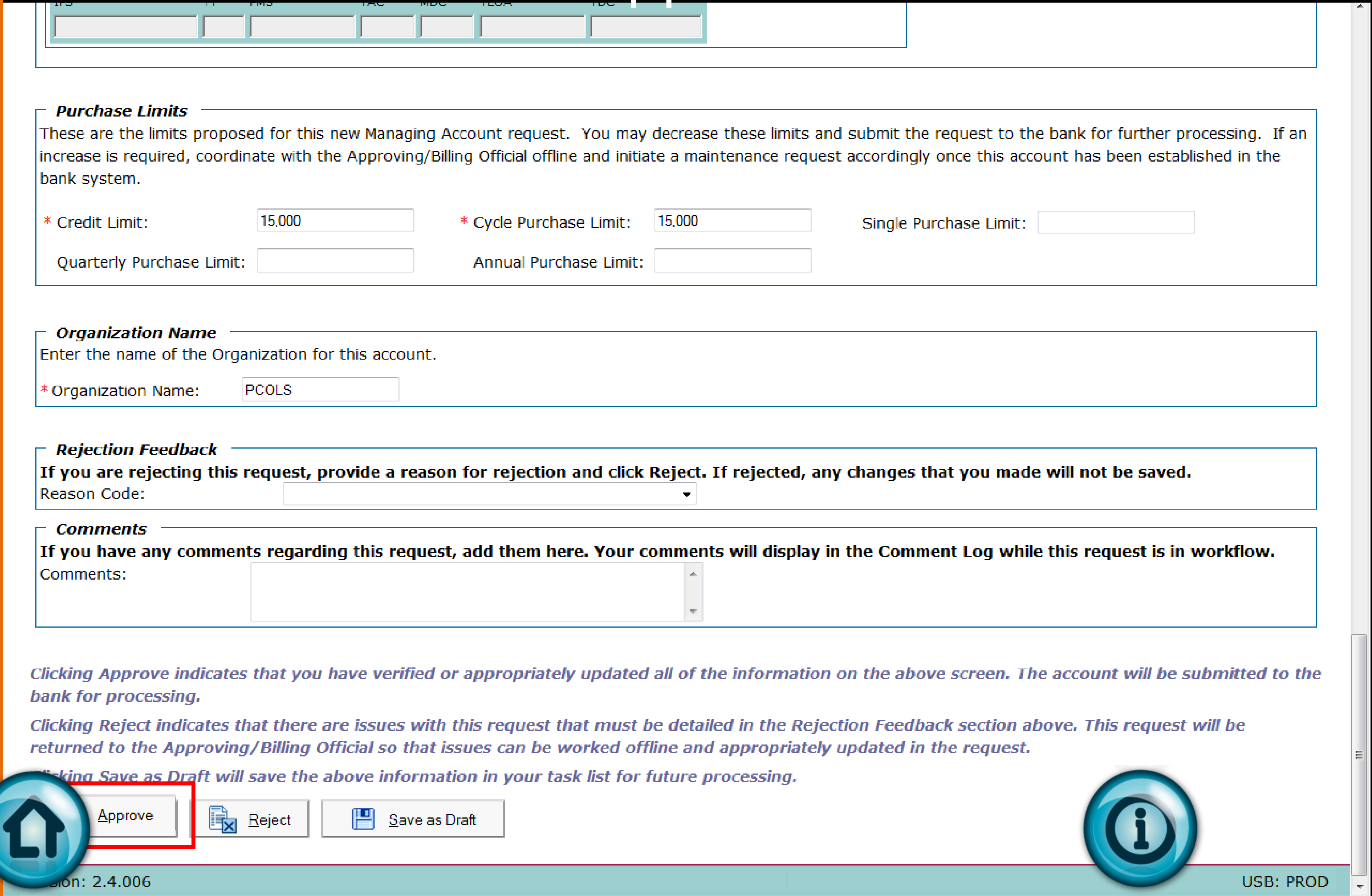
anization Name

the name of the Organization for this account.

rganization Name: PCOLS

A/OPC Action 2 AIM: Approve Managing Account

The A/OPC has verified that the managing account can now be submitted to the bank. Click the “Approve” button.



Purchase Limits

These are the limits proposed for this new Managing Account request. You may decrease these limits and submit the request to the bank for further processing. If an increase is required, coordinate with the Approving/Billing Official offline and initiate a maintenance request accordingly once this account has been established in the bank system.

* Credit Limit: 15,000

* Cycle Purchase Limit: 15,000

Single Purchase Limit:

Quarterly Purchase Limit:

Annual Purchase Limit:

Organization Name

Enter the name of the Organization for this account.

* Organization Name: PCOLS

Rejection Feedback

If you are rejecting this request, provide a reason for rejection and click Reject. If rejected, any changes that you made will not be saved.

Reason Code:

Comments

If you have any comments regarding this request, add them here. Your comments will display in the Comment Log while this request is in workflow.

Comments:

Clicking Approve indicates that you have verified or appropriately updated all of the information on the above screen. The account will be submitted to the bank for processing.

Clicking Reject indicates that there are issues with this request that must be detailed in the Rejection Feedback section above. This request will be returned to the Approving/Billing Official so that issues can be worked offline and appropriately updated in the request.

king Save as Draft will save the above information in your task list for future processing.

Note: Clicking Approve indicates that you have verified or appropriately updated all of the information on the above screen. The account will be submitted to the bank for processing.

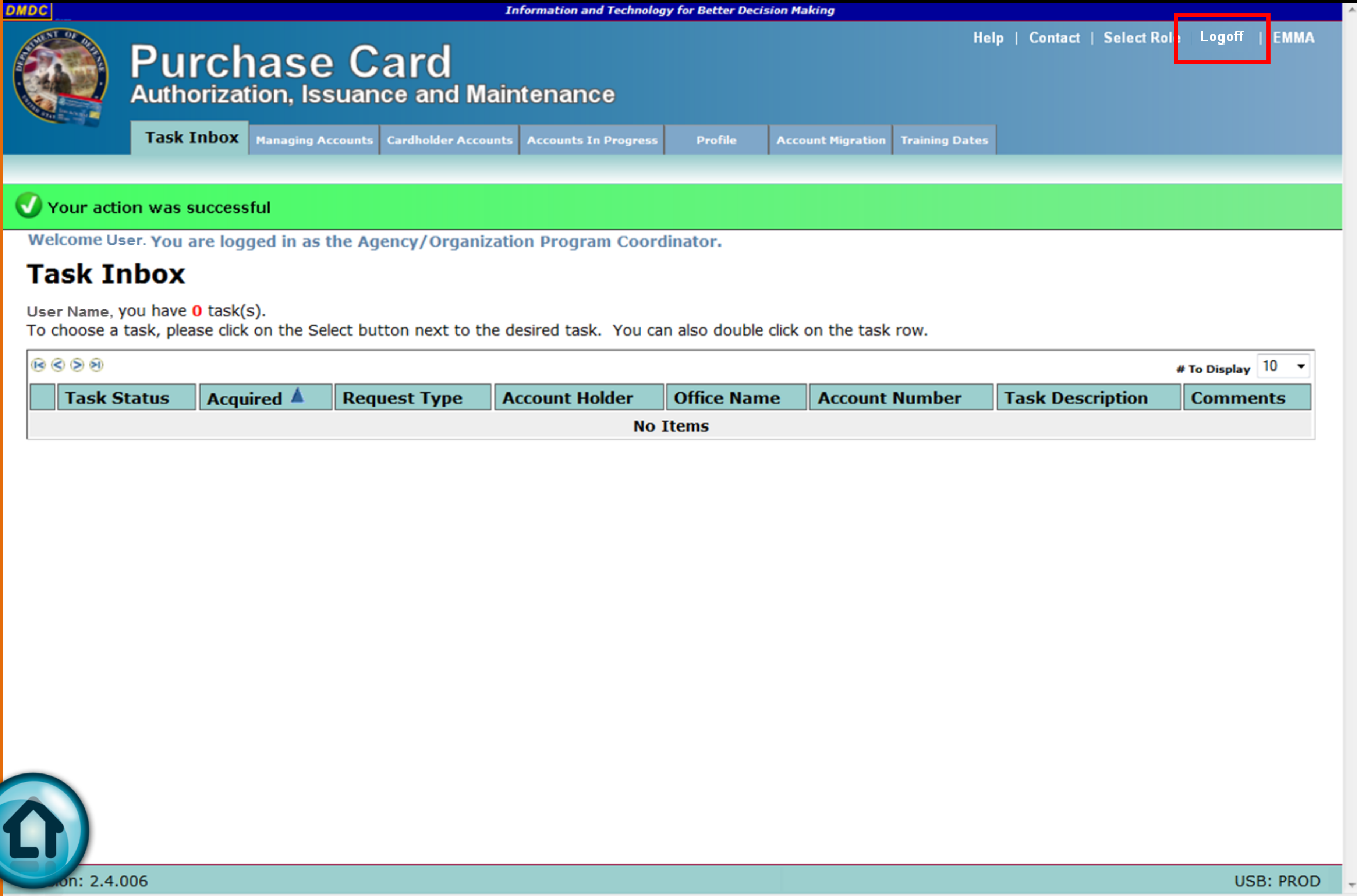
Clicking reject indicates that there are issues with this request that must be detailed in the Rejection Feedback section above. This request will be returned to the Approving/Billing Official so that issues can be worked offline and appropriately updated in the request.

Clicking Save as Draft will save the above information in your task list for future processing.

Tip: To check the status of an account request, click the **Accounts in Progress** tab.

A/OPC Action 2 AIM: Approve Managing Account

The action was successful. The request has been sent to the bank. Click the “Logoff” link.



DMDC Information and Technology for Better Decision Making

Help | Contact | Select Role | Logoff | EMMA

Purchase Card
Authorization, Issuance and Maintenance

Task Inbox | Managing Accounts | Cardholder Accounts | Accounts In Progress | Profile | Account Migration | Training Dates

✓ Your action was successful

Welcome User. You are logged in as the Agency/Organization Program Coordinator.

Task Inbox

User Name, you have 0 task(s).
To choose a task, please click on the Select button next to the desired task. You can also double click on the task row.

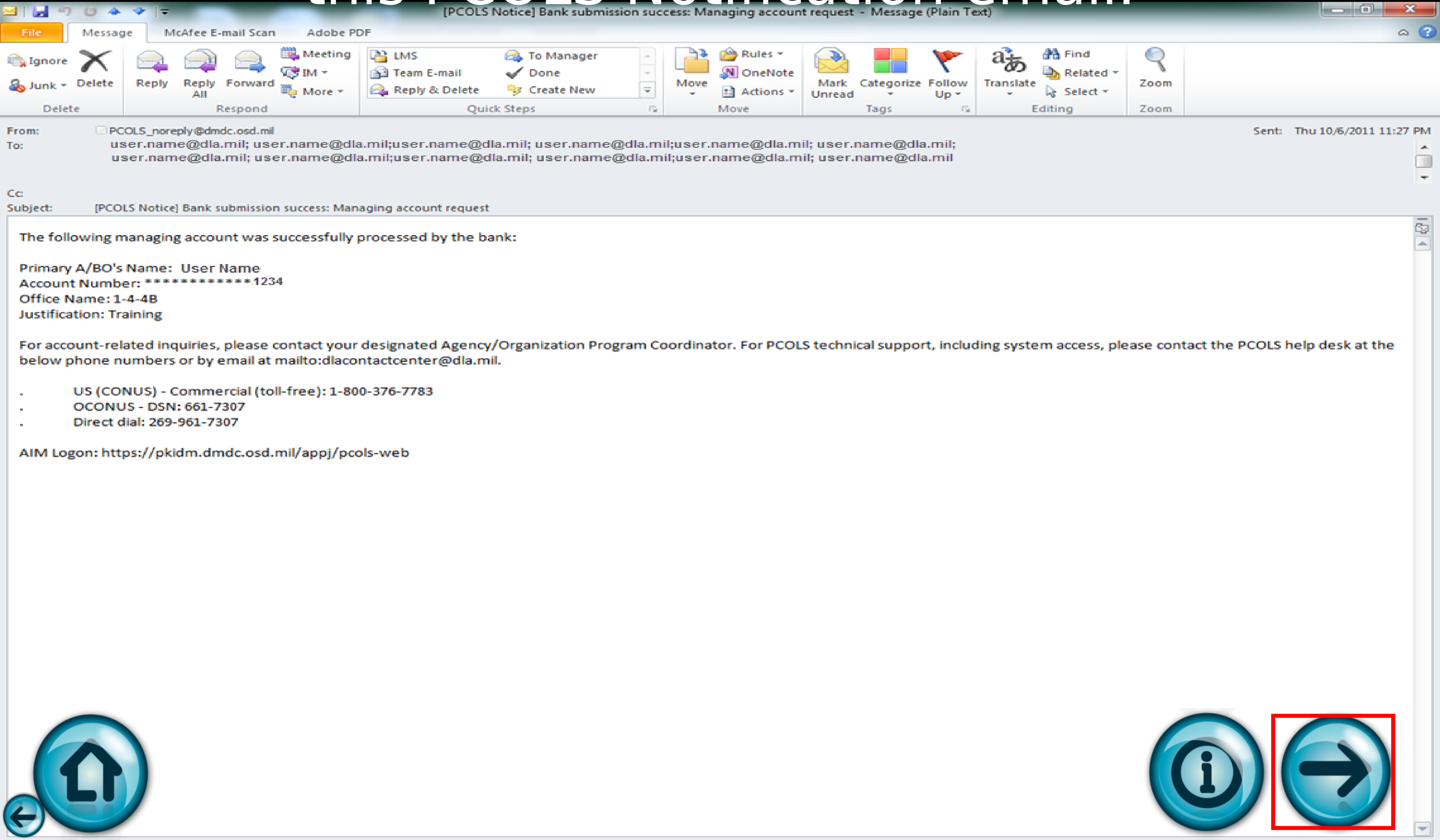
To Display 10

	Task Status	Acquired	Request Type	Account Holder	Office Name	Account Number	Task Description	Comments
				No Items				

ion: 2.4.006 USB: PROD

A/OPC Action 2
Complete

After 2 business days the new Managing Account was successfully processed by the bank. All users associated with the new account have received this PCOLS Notification email.


[PCOLS Notice] Bank submission success: Managing account request - Message (Plain Text)
File
Message
McAfee E-mail Scan
Adobe PDF
Ignore
Junk
Delete
Reply
Reply All
Forward
Meeting
IM
More
Respond
LMS
Team E-mail
Reply & Delete
To Manager
Done
Create New
Quick Steps
Move
Rules
OneNote
Actions
Mark Unread
Categorize
Follow Up
Tags
Translate
Find
Related
Select
Editing
Zoom

From: PCOLS_noreply@dmdc.osd.mil

Sent: Thu 10/6/2011 11:27 PM

To: user.name@dla.mil; user.name@dla.mil;user.name@dla.mil; user.name@dla.mil;user.name@dla.mil; user.name@dla.mil; user.name@dla.mil; user.name@dla.mil;user.name@dla.mil; user.name@dla.mil;user.name@dla.mil; user.name@dla.mil

Cc:

Subject: [PCOLS Notice] Bank submission success: Managing account request

The following managing account was successfully processed by the bank:

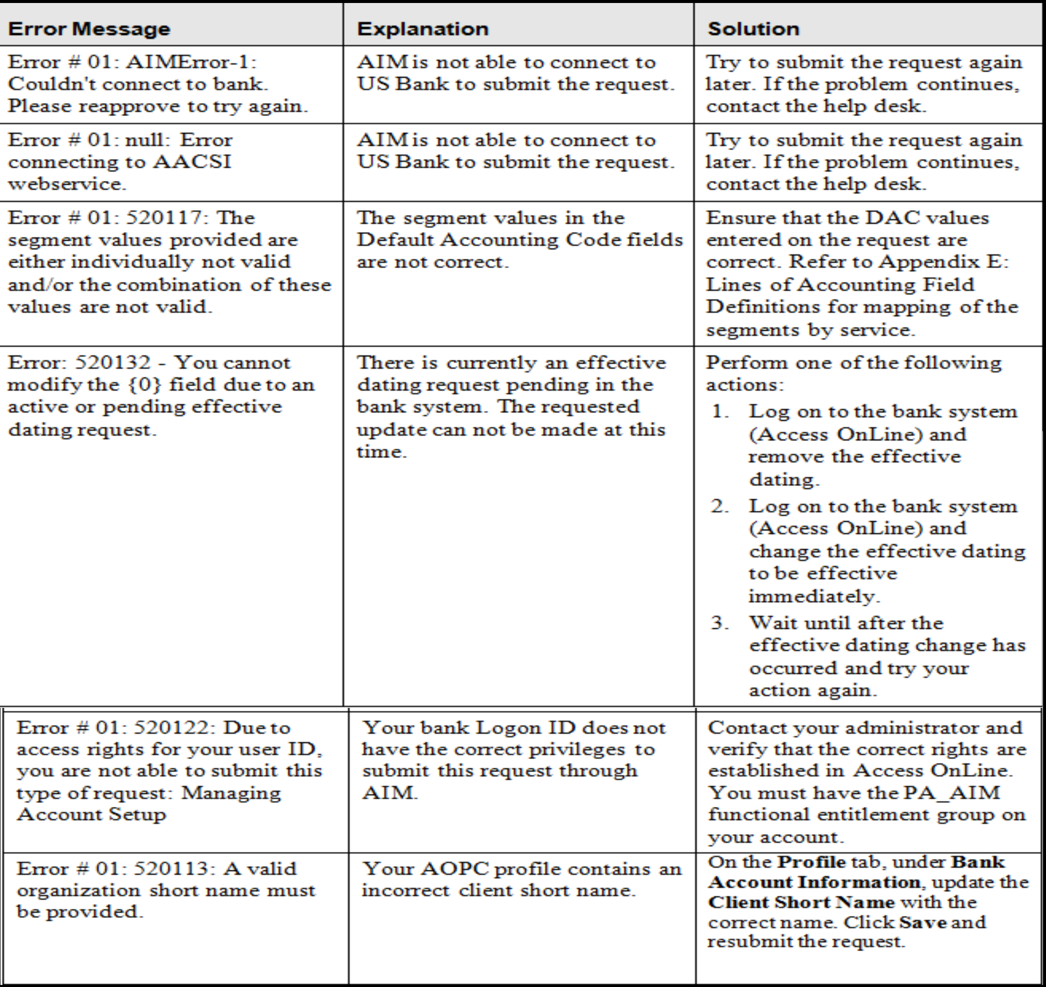
Primary A/BO's Name: User Name
Account Number: ************1234
Office Name: 1-4-4B
Justification: Training

For account-related inquiries, please contact your designated Agency/Organization Program Coordinator. For PCOLS technical support, including system access, please contact the PCOLS help desk at the below phone numbers or by email at mailto:dlacontactcenter@dla.mil.

- US (CONUS) - Commercial (toll-free): 1-800-376-7783
- OCONUS - DSN: 661-7307
- Direct dial: 269-961-7307

AIM Logon: https://pkidm.dmdc.osd.mil/appj/pcols-web

What to do if you get a PCOLS Notification for a BANK SUBMISSSION FAILURE



Error Message	Explanation	Solution
Error # 01: AIMError-1: Couldn't connect to bank. Please reapprove to try again.	AIM is not able to connect to US Bank to submit the request.	Try to submit the request again later. If the problem continues, contact the help desk.
Error # 01: null: Error connecting to AACSI webservice.	AIM is not able to connect to US Bank to submit the request.	Try to submit the request again later. If the problem continues, contact the help desk.
Error # 01: 520117: The segment values provided are either individually not valid and/or the combination of these values are not valid.	The segment values in the Default Accounting Code fields are not correct.	Ensure that the DAC values entered on the request are correct. Refer to Appendix E: Lines of Accounting Field Definitions for mapping of the segments by service.
Error: 520132 - You cannot modify the {0} field due to an active or pending effective dating request.	There is currently an effective dating request pending in the bank system. The requested update can not be made at this time.	Perform one of the following actions: 1. Log on to the bank system (Access OnLine) and remove the effective dating. 2. Log on to the bank system (Access OnLine) and change the effective dating to be effective immediately. 3. Wait until after the effective dating change has occurred and try your action again.
Error # 01: 520122: Due to access rights for your user ID, you are not able to submit this type of request: Managing Account Setup	Your bank Logon ID does not have the correct privileges to submit this request through AIM.	Contact your administrator and verify that the correct rights are established in Access OnLine. You must have the PA_AIM functional entitlement group on your account.
Error # 01: 520113: A valid organization short name must be provided.	Your AOPC profile contains an incorrect client short name.	On the **Profile** tab, under **Bank Account Information**, update the **Client Short Name** with the correct name. Click **Save** and resubmit the request.

A Bank Submission Failure stating the error "**Address is missing or invalid**" is due to a missing or invalid work address for the **Primary A/BO** in PCOLS. The A/BO can go to the DEERS website to update their address: https://www.dmdc.osd.mil/appj/address/. Once corrected, the A/OPC can resubmit the request to the bank.

Note: Once the error is corrected, the A/OPC can resubmit the request to the bank. **Only RMs can correct an error due to segment values in the Default Account Code (DAC) in AIM.**

This concludes the PCOLS 101 Interactive Tutorial:

How to Create a New Managing Account in AIM

101

PCOLS

INTERACTIVE TUTORIAL

To learn how to create a new cardholder account view the PCOLS 101 Interactive Tutorial: **How to Create a New Cardholder Account in AIM**

To exit tutorial press ESC on your Keyboard